



IT SERVICE MANAGEMENT CASE STUDIES

Client: An energy distribution Company with headquarters in Canada and operations all across Canada and the US. There are approximately 5000 employees and several units in the IT department.

Background: Management of changes and failures was split across all of the IT units and also included an outsourced Service Desk. Without centralized governance, methods for managing failures, changes, setting priorities and escalating issues for management attention had grown up in each of the units. Only one unit was using a tool for handling failures, but there were five change “recording” systems in place. The Incident tool was not providing any management level reporting and minimal operational reports. Along with the Service Desk staffing, management of the software was out-sourced about two years prior to initiation of the project.

Project: Driven in part by regulatory requirements the CIO gave the line managers a mandate to document unified processes for failure handling, change management and root cause investigations. BMC Remedy was purchased and an ITSM consultant was engaged to manage the project and a Remedy developed.

Methodology: An internal Subject Matter Expert was selected based on familiarity with the existing workflow and interest in the project. The ITSM consultant, working with the SME, assessed the existing systems against best practice. The existing systems were then used to form the basis of the new processes. Next, a core team of representatives was selected from each operational area and specialty. Using the base information, the ITSM consultant designed and facilitated a series of workshops on each process to define the process activities and flesh out the details such as a common prioritization and escalation rules.

The workshops were held over a period of three months, two to three per week. This work was then translated into functional requirements for the software, with additional workshops held to define common software requirements.


When all of the necessary workshops had been completed for a process, documentation was prepared and reviewed by all core team members.

Prior to deployment, training was conducted for all IT staff on the new processes and on using the new tool. Training was also provided to key end users and “lunch and learn” sessions were made available to all staff.

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Client: An insurance payment mediation firm operating Call Centres in two languages in Canada. This firm makes the connection between insurance carriers and health care practitioners. For instance, when a client goes to the dentist, the dentist sends the billing request to the mediation firm which then matches the requests against the client’s coverage. The Call Centres take calls from practitioner offices.

Background: Calls coming in to the call centres were tracked with spreadsheets. Month end reporting, required for management, operation and billing, took days to prepare and were very difficult to audit. In the IT Support department, calls on failure were routed to various individuals with no tracking making



follow up and trend analysis impossible. In order to maintain ISO 9000, the company was operating on the principle that a root cause analysis was required for each failure. This had become extremely onerous but ISO 9001 certification was a business imperative.

Project: A plan was required to determine how to simplify call tracking and provide much needed reporting in both the IT department and the Call Centres. In addition, the issue of root cause analysis needed to be handled in order to reduce the cost while maintaining certification. An ITIL® expert was engaged to examine the issues, make recommendations and develop a detailed implementation plan.

Methodology: Following definition of the scope of the project, a thorough review of all available documentation was made. Based on the project scope, existing documentation and standardized ITIL® assessment points, a set of interview questions were developed. Selected staff from call centres and the IT support organizations were interviewed and their answer to the questions recorded and analysed. Analysis revealed that both groups had common requirements, so a proposal was made to Senior Management to proceed using ITIL® methodologies for Incident and Problem Management, to be deployed across the company.

The project was completed by developing a project plan with the internal staff who would be executing the deployment project. Follow up mentoring was provided during the execution of that project.

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Client: A cluster within the Province of Ontario. (In Ontario, IT Support is provided to Ministries through Clusters. This cluster employs approximately 300 IT staff to provide application management and front line support to two Ministries and to clients outside of the provincial government.)


Background: A high level Change Management process had been implemented across about 70% of the organization based on an enterprise level guideline. A combination of spreadsheets, word processing documents and email were used to track changes but this was found to be very expensive, labour intensive and error prone.

Project: A project was created to achieve the following goals:

- Develop and deploy detail for the existing process;
- Complete deployment to 100% of Cluster staff and teams;
- During the early planning phase of the project a determination was made that in order to include additional staff a tool would be necessary to track changes.

Expenditures on the tool were to be limited as an Enterprise tool was expected within the next 6-8 months.

Methodology: A draft of detailed procedural documentation was developed based on the existing process and information from Subject Matter Experts – the Change Coordinators and Change Manager. Additional requirements were gathered from other stakeholders, including the teams which were already using Change Management and the teams which would be joining the process.



Although changes to the Process itself were out of scope, all requirements identified during this process were retained to be brought to the Enterprise Change Management project.

A Business Analyst was engaged to translate the procedures into requirements for a tool and an in-house programmer developed an intranet based application that fulfilled all tracking, reporting and scheduling requirements.

Prior to deployment, training materials were developed and delivered to cover both the Process steps and how these steps had been implemented in the tool. Final deployment was completed within the agreed time frame.

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Client: Prior to 2000, a single government agency was responsible for all electrical generation and distribution in the province.

Background: In preparation for opening the electrical market to private competition, new functionality was required in the business systems. A large development project was instituted.

Project: Our consultant was engaged to act as the Operations Team Lead to the project. In order to manage development and testing operations for 13 integrated but distinct applications across 30 mid-range and Wintel servers. The project environment included over 100 developers and testers in a quickly evolving, strictly regulated environment.

The Operations team was responsible for creation and operation of project environments, management of Approval/Acceptance artefacts, and development and maintenance of technical documentation.


Methodology: Operational activities were managed using processes and procedures developed and implemented during the early stages of the project and under constant review for improvement. Change, Configuration, Incident and Problem Management were used. Final deliverables included transition planning, knowledge transfer and third level technical support during transition.

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Client: Prior to 2000, the government agency responsible for electrical generation and distribution evolved into several different business units. A decision was taken to move IT support out of the core businesses and between 2000 and 2002 that support was devolved to a partnership with a major outsourcing firm. This firm provided end-to-end support to meet all application, infrastructure and hosting requirements.



Background: In order to support this client and others it was determined that all components used to provide services needed to be formally identified and tracked.

Project: Our consultant was engaged to act as the Technical Project Lead. The scope of the project was to include all supported Services and all components required to supply those Services.

Methodology: A “straw model” was developed to facilitate discussion and meetings were held with all stakeholders to identify the components to be tracked and which information was required for each component. Once the base set of components had been identified, the relationships between multiple components and the relationships between components and Services were identified.

The next step was to determine how the data would be maintained. Change Management was in place, and was used to manage changes to high level components. Tools were used to validate some of the data and to collect information on lower order items such as workstations and printers.

At the close of the project, requirements were developed to integrate the base system into the existing Change Management tool.