

VMware Service Manager pays dividends for Punter Southall Group



Punter Southall
GROUP

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– Madeleine Millar, Service Improvement Manager, Punter Southall

KEY HIGHLIGHTS

Customer

Punter Southall

Industry

Finance

Challenges

- Introduce ITIL best practice processes across the organization
- Rapidly deploy a single scalable service desk
- Establish sound basis for governance and financial management

Key Solutions

VMware Service Manager, Service Desk, Service Workflow, Service Portal and Service Catalog

Benefits

- 99% of Incidents and Problems cost-effectively logged via Service Portal
- SLAs introduced: SLA breaches reduced by 75% within one year
- Management of key IT and business processes using Workflow automation
- Development of integrated procurement capability

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Punter Southall Group provides actuarial and investment advice to UK pension schemes and their sponsors, institutions and private clients. With its headquarters in London’s Jermyn Street and 12 offices nationwide, Punter Southall’s client base encompasses 1,000 pension schemes, companies and organisations as well as over 4,000 private individuals.

Established in 1988 with the aim of introducing a fresh, competitive presence to the pension services market, the company’s stated ethos is ‘client first’. Passionate about what they do, Punter Southall is the only actuarial firm listed in the Managing Partners’ Forum (MPF) ‘100 Best Professional Firms to Work For 2008’ Report - a league table of professional firms that surveyed over 700,000 employees and is used by The Sunday Times to compile their ‘Best Companies To Work For’ list.

Believing that communication is key to building successful relationships – both with clients and internally – Punter Southall Group decided to invest significantly in a new IT Service Management regime that would better reflect the needs of the business. In 2007 an internal survey was carried out to enhance user experience and satisfaction.

At the time, there were two separate IT helpdesk systems in operation, but no clear process for managing, allocating and resolving the issues that were being reported to each. Against this backdrop, the IT department needed a way to measure the extent of the issues.

Aligning IT Services

At this point Madeleine Millar joined the company as Service Improvement Manager and embraced the challenge to update the existing IT support environment. Using ITIL best practice as the starting point, she set out to implement a business-aligned service strategy that could keep pace with the dynamics of Punter Southall Group’s business, and also provide a sound basis for governance and financial management. Selecting a new Service Desk tool was integral to the mission.

“Our goal was to implement ITIL best practice for Incident and Problem Management as quickly as possible, but we also realised the importance of finding a robust solution that could carry us forward in the future as well,” explains Madeleine Millar.

“VMware Service Manager, offered high levels of integration between processes, plus the out-of-the-box functionality and reporting we required. The vendor’s partnership approach and obvious commitment to helping us get the most out of our investment was also very appealing.”

The decision made, Millar and the Team set an aggressive timetable of just two months for initial implementation of its new IT Service Desk. She set to work on fully documenting the processes for Incident and Problem Management using the Rules Builder within the VMware solution to help create the required call assignment and notification system.

Visible results

According to Millar, “Better communication between IT and its customers has been one of the biggest benefits of the VMware system. The old-style helpdesks were seen as something of a ‘black hole’, but now each call is logged and tracked within the system, then formally closed once we are sure the customer is satisfied. It has proved much easier to keep everyone informed along the way using the standard emails set up in the system.”

Frontline analysts now handle around 1,800 calls per month, 99% of which are logged via the system’s self-service customer portal. Priority and standard response times are set according to call type and user profile, and when calls are escalated to the second line, engineers have access to the complete call history.

The introduction of Service Level Agreements (SLAs) in April 2008 has also proved significant.

“In less than a year, the level of SLA breaches has fallen dramatically from about 90% to just 15% today,” comments Millar. “Being able to measure how the team is performing has been crucial to building a productive dialogue with the wider business. Using VMware Service Manager we have, for example, been able to produce the metrics on call types and volumes that we needed to back up our resource plan, and this in turn has helped to create a common understanding of IT’s challenges and goals.”

Punter Southall Financial Management Business Head, John Hamilton Hunt provided feedback to the service desk, stating “The introduction of the service desk into our working environment has provided a better quality of communication, improved service and overall understanding between the central IT support and ourselves. It will also lead to us obtaining management information on the operational functionality of our business which enables us to set and maintain future standards.”

Improved service delivery has also seen the IT Services team take on more responsibility including management of the new starter/leaver process using workflow automation to progress requests and approvals. A link established between asset information and the CMDB has also allowed the development of an integrated procurement capability.

According to Millar, “Automated workflows have made the procurement process much faster and smoother for everyone involved, and we can now present managers with a monthly report showing what’s been purchased and why. Working this way certainly highlights a new found ability to contribute proactively to the business.”

For business users and IT

Being readily able to design call screens that match specific user logins has also proved a bonus to other business groups such as HR and Facilities, who have now started using the VMware solution to log and process requests. The facilities department, for example, was recently able to put the system to good use tracking Incidents relating to a faulty air conditioning unit. Previously, it had been difficult to establish the scale of the problem, but using VMware Service Manager's reporting tool to produce a trend analysis and accurate statistics, the company was able to push for immediate remedial action from the third party supplier of the unit.

Back in the IT department, having focused heavily on defining and refining the list of available IT services, Punter Southall is planning to introduce a Business Services Catalog later in the year. And the VMware Service Manager solution is providing strong foundation for the challenges ahead, which include further development of the CMDB, integration of the Change & Release cycle and increased financial management.

"From initial planning right through the implementation and beyond, I would rate the support we have received from VMware as 'platinum' ", Madeleine Millar maintains. "Finding a partner with a clear roadmap, who is fully committed to supporting customers and investing in technology enhancements is very important, and we certainly haven't been disappointed."

