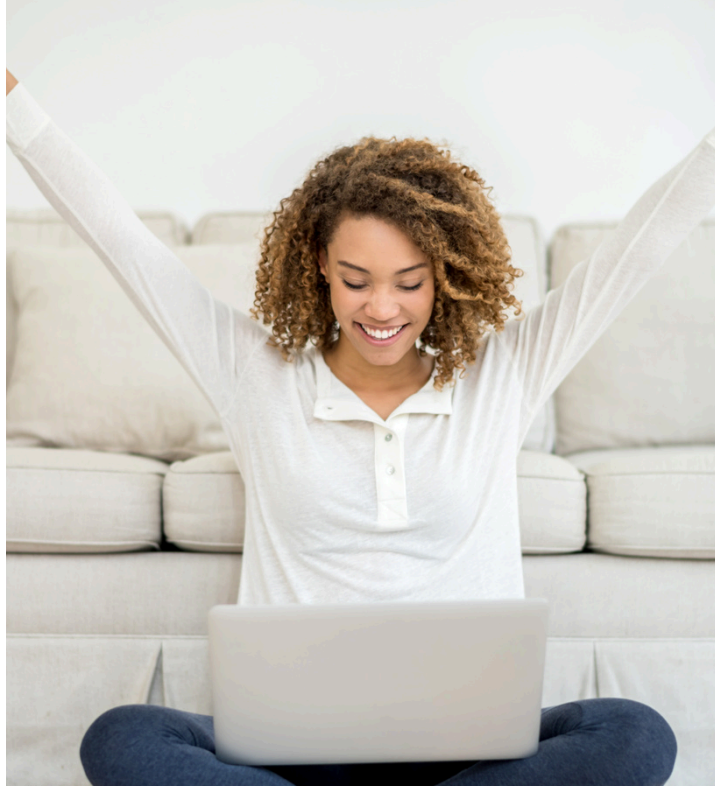




CASE STUDY

Cloud-Based IT Service Management Transformation for a Global Investment Bank



OVERVIEW

KA2's client is a globally recognised investment bank that offers risk management, trading solutions and debt financing to help address its customers' challenges. The client launched a company-wide digital transformation initiative driven by a regulatory requirement to separate its investment banking operations from the retail side of its business.

As a customer-focused organisation, customer experience, satisfaction and efficiency were key priorities. The bank adopted a cloud-first IT strategy and sought new ways of working to support its wider transformation programme.

One of the key workstreams was to modernise the organisation's IT Service Management function and align its operating model with the new strategy. This required an approach that could support the bank's distinct security, compliance and operational requirements while enabling faster, more agile service delivery.



"A key success for this project was delivering a standardised implementation with zero customisation, helping establish a foundation for seamless, issue-free updates and continuous improvement."

KA2 Head of Enterprise Service Management

THE CHALLENGE

The bank sought to implement a cloud-first IT Service Management strategy that would enable it to achieve two core objectives.

Strengthen security, compliance and risk controls

As an investment bank, the client had different risk requirements from the retail side of the business. It wanted to modernise its ITSM function to better reflect its specific operational needs and regulatory obligations. Moving to the cloud also required new practices to support secure business operations and ensure appropriate regulatory controls were in place.

Enable faster, more agile service delivery

The ITSM transformation provided an opportunity to improve service delivery across the organisation. As part of its new operating model, the bank wanted to adopt a leaner resource structure without compromising service quality or its ability to accelerate project delivery across the organisation.



CASE STUDY

THE SOLUTION

KA2 was selected to support the bank's ITSM transformation, drawing on its extensive experience of implementing standardised service management platforms within highly regulated financial services environments.

Using the KA2 Smarter Framework, KA2 established a security-led, outcomes-focused approach to implementing the new platform and transforming the wider ITSM operating model. This involved challenging existing practices and identifying opportunities to improve service delivery, strengthen governance and support continuous innovation.

Building stakeholder engagement and ITSM capability

KA2 led ITSM workshops to establish a shared understanding of the required business outcomes, build stakeholder support and embed recognised service management good practice. The programme also helped develop a digital culture focused on improving the experience of internal customers.

Developing an 18-month ITSM roadmap

KA2 created an 18-month roadmap to guide implementation and ongoing development. The roadmap was designed to scale with business demand while integrating information security and internal governance controls into the target operating model.

Establishing the operating model and delivery team

KA2 defined the project team structure, roles, skills and competencies required to deliver the agreed strategy and transition the new service into production support. KA2 also managed the recruitment process to establish the required team.

Introducing a phased deployment model

A rapid deployment approach enabled the bank to introduce key functionality incrementally across two phases.

Phase 1: Change Management and Core Foundations

Implemented change management processes to provide a systematic approach to controlling the lifecycle of changes. This included establishing the data model and Configuration Management Database (CMDB) foundation and introducing an agile Continuous Service Improvement (CSI) development and deployment process.

Phase 2: Wider ITSM Capabilities

Introduced incident management, including major incident management, problem management, knowledge management, request management and the service portal. Further CMDB enhancements and localised service processes were also implemented.

This phased approach established the core capabilities first, while providing a structured route for further development and continuous improvement.



"KA2 not only led the implementation of our IT service management platform, but also helped us identify and take advantage of the opportunity to develop a foundation for continuous innovation."

Head of IT Service Management
Global Investment Bank



CASE STUDY

THE BENEFITS

The bank established a new ITSM organisation supporting both its cloud-based and on-premise technology estate. The modernised platform enabled the ITSM team to deliver a faster, more consistent, secure and compliant service to end users.

Key outcomes included:

- **Accelerated change delivery:** Streamlined change management supported faster project delivery across the wider infrastructure transformation programme, moving the bank towards its ambition of zero-lead-time change requests.
- **Stronger security and compliance:** Embedded governance and security controls into the ITSM operating model to support the bank's regulatory requirements.
- **More efficient operations:** Established an operating model designed to improve efficiency, reduce costs and enhance reporting.
- **Simplified platform management:** Standardised functionality provided a foundation for lower administration overheads and faster adoption of new capabilities.
- **Continuous improvement:** KA2 recommended automated testing to support good development practices and improve the efficiency of delivering enhancements.
- **Successful platform upgrades:** The bank completed three major platform releases, known as London, Madrid and New York, without issues and within demanding timescales.
- **Expanded digital capabilities:** The stable platform enabled the bank to extend its capabilities into security operations and IT operations management.

The success of the implementation was recognised by the platform provider, which invited the bank to participate in its Early Availability Programme, providing opportunities to access new products ahead of wider release.

The project also received a five-star customer satisfaction rating.

With the new ITSM operating model and platform in place, the bank continues to advance its ambition to become a modern, cloud-based, digital-first organisation.

OUTCOME HIGHLIGHTS



Accelerated Change Delivery

Enabled more efficient change management, supporting the bank's ambition to move towards zero-lead-time change requests.



Governance and Compliance Embedded

Applied the KA2 Smarter Framework to align service management, delivery and controls with the bank's requirements.



Simplified Platform Management

Adopted standard functionality to reduce unnecessary complexity, simplify administration and support faster adoption of new capabilities.



More Efficient Operating Model

Improved operational efficiency, reporting and change delivery through a modernised ITSM organisation.