



CASE STUDY

IT Service Management Consulting: Improving Platform Performance for a Banking Client

OVERVIEW

KA2 began working with this banking client in 2021 to improve its IT Service Management (ITSM) platform, address existing limitations and support the organisation's future ambitions.

An internal review had revealed that the platform was not meeting current business requirements. The client struggled to realise the full commercial value from its software licences and make use of the available functionality. KA2 was engaged to identify the issues, improve platform capabilities and establish a stronger foundation for effective service management.

THE CHALLENGE

The main problem was that the platform did not manage the organisation's key processes. For instance, the Change Management process sat outside the platform with limited integration, and much of the core ITSM functionality was either not enabled or not fully leveraged. In addition, limited discovery capability and an incorrectly structured underlying data model meant information was not centralised, consistently captured or trusted by those using the platform.

Previous configurations had also restricted the platform's capabilities, making it difficult to adopt additional functionality available through existing software licences.

KA2's key objectives were to maximise the value of the Bank's investment by focusing on Configuration Management, Discovery, process integration and knowledge transfer to the client's technical and service management teams and end-users.



The combined KA2 teams' knowledge and expertise delivered a range of value adds in addition to meeting the defined project outcomes. I really enjoyed working with them to achieve the Bank's business objectives and look forward to collaborating with them on our ongoing service management improvement journey.

Head of IT Service Management
Retail Bank

THE SOLUTION

Working in close partnership with the newly appointed platform owner, KA2's Engagement Director, Solution Consultants and Business Analyst, all highly experienced in configuration management and ITSM platform re-implementation projects, identified several key areas for improvement. These focused on the data model and Configuration Management Database (CMDB), incident management, including major incident processes, and integrating change management with the client's in-house processes managed in Jira.

KA2 also developed a roadmap for improving other processes and capabilities, including knowledge management, the service portal and problem management. In addition, we implemented a virtual agent proof of concept to help the client evaluate its potential for wider adoption across the organisation.



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THE DELIVERY

After a full review of our client's overall business and operational functions, KA2 determined their current challenges and vision of the future operating model. By running workshops and building development stories, we captured the desired project outcomes and used them as guardrails throughout the project lifecycle to govern delivery objectives. We demonstrated how the ITSM platform could support and enhance the client's business functions and provided a roadmap of future capability and improvement opportunities.

With the principle of using OOTB functionality and by challenging stakeholders, we ensured no complex configurations or customisations were required to meet their requirements.

Adopting an agile release when ready development model KA2 delivered accelerated value throughout the project. We gained constant feedback through regular stakeholder playbacks and enabled KA2 to enhance the deliverables on an iterative basis.

Additionally, KA2 resolved several issues with the platform's discovery function, enabling the CMDB to be populated correctly for the first time.

And using the KA2 Smarter Framework to provide strong project governance, we delivered the project on budget and on time.

THE BENEFITS

Our client has a fit-for-purpose ITSM platform that will allow them to continue their journey to improve internal processes and ultimately support an enhanced customer and end-user experience.

An important outcome is that the CMDB is now being updated automatically by the platform's discovery tool, ensuring that the data is trusted and centralised. It also supports the integrated processes, radically improving service availability for end-users and customers.

Critically, the client has seen a dramatic improvement in the return on investment from the ITSM platform and full utilisation of the licenced functionality.

They can now focus on further initiatives and enhancements, such as automation and the user experience, confident that the platform can readily support their journey.



"A key driver was to maximise the utilisation of existing purchased licences and enable wider platform capability. I was really pleased that the KA2 team was able to exceed the customer's expectation"

KA2 Head of Enterprise
Service Management

OUTCOME HIGHLIGHTS



Established a robust ITSM platform aligned with the bank's business requirements.



Maximised value from existing software licence investment.



Re-baselined the platform to meet evolving business requirements.



Established an accurate CMDB and supporting data model, with automated discovery helping maintain trusted, centralised information.