



CASE STUDY

IT Service Management Platform Modernisation for a Global Investment Manager



“Our expertise and technical capability were key to the success of the platform re-implementation. The complexity of the project raised a number of challenges, which we overcame together to ensure that the new platform met all of our key project deliverables. The zero-customisation implementation removed technical debt and enabled rapid adoption of new functionality and agile development capability.”

Service Platform Owner, Global Investment Management Organisation



“Our customer’s existing ServiceNow platform had become a costly and complex barrier to driving business innovation. We helped them build the business case for re-implementation, and then delivered a smarter, out-of-the-box solution using ServiceNow best practice. The outcome: a robust, cost-efficient foundation for ongoing success that delivers accelerated results.”

KA2 Head of Enterprise Service Management

OVERVIEW

A leading global investment management organisation and early adopter of IT service management technology undertook a transformation project to return its platform to a simpler, standard configuration.

KA2’s customer provides investment management services, including mutual funds, pension management and fund platforms for private and institutional investors. As part of a wider technology refresh strategy, the organisation engaged KA2 to complete a benefits assessment to determine whether to re-engineer the existing platform or implement a new instance.

Based on KA2’s recommendations, the organisation chose to implement a new instance, with KA2 leading the project.

THE CHALLENGE

The organisation wanted to achieve a clean start for its IT service management platform, which had been the cornerstone of its ITSM function over the previous seven years.

The key project outcomes agreed with the customer in line with KA2’s Smarter Framework process included:

Building a solid foundation: During the seven years the organisation had used the platform, it had become increasingly complex and was becoming difficult to maintain. Functionality that previously required custom development and configuration was now available as standard. Moving to a clean instance would provide a strong foundation for future development and easier adoption of new capabilities. Particular focus was given to IT change management, which could build on the organisation’s established and mature process.



CASE STUDY

- **Reducing the operational burden:** The complexity and technical debt that had built up over time made each release cycle demanding, particularly the testing required to ensure successful deployment. A new instance would enable faster adoption of new releases and additional capabilities, with less reliance on internal resources to support testing and deployment.
- **Removing unnecessary complexity:** Over seven years, limited platform housekeeping and operational management had resulted in redundant data, reports and configurations that could be removed to ensure the new instance was accurate and clean. Removing complex configurations would also simplify administration and support a more agile delivery model.



THE SOLUTION

Using the KA2 Smarter Framework, KA2 worked with key stakeholders to ensure the organisation's business outcomes were fully understood, documented and agreed before designing the new implementation.

- **Project planning and governance:** Developed a detailed project plan aligned with the organisation's business requirements, timelines and budget.
- **Collaborative delivery:** Worked in partnership with the organisation's internal teams, providing leadership, support, experience and specialist expertise throughout the implementation.
- **Integration and data management:** Retained and configured the integrations, data model and capabilities required for the new environment.
- **Process improvement:** Reassessed IT change management, incident management (including major incidents), problem management, request management, the service catalogue, knowledge management and the service portal with their respective process owners. KA2 challenged existing approaches to encourage recognised good practice and standard functionality.
- **Standardised implementation:** Implemented the new platform using standard functionality and zero customisation, while working closely with the parallel IT asset management project team.
- **Data migration:** Managed the migration from the legacy platform, including data cleansing, restructuring and transfer to the new instance.
- **Go-live preparation:** Prepared and tested the release in collaboration with the organisation's teams, ensuring the relevant stakeholders and change approval teams were confident in proceeding.
- **Early life support:** Successfully delivered the release and provided a short period of support following go-live.



CASE STUDY

THE BENEFITS

- **Faster platform releases:** Reduced release cycles and the resources required for testing, enabling releases to be deployed in days and weeks rather than months.
- **Greater adoption of new capabilities:** Created a clean platform that made it easier to adopt new functionality as it became available.
- **Reduced technical debt:** Removed redundant data and unnecessary configurations, improving administration and troubleshooting and helping teams resolve incidents and issues more quickly.
- **More efficient service processes:** Adopted standard functionality across IT change management and other processes, reducing mistakes and accelerating change approvals and workflow lifecycles.
- **A foundation for future development:** Established a stable, reliable platform to support additional business processes and applications.
- **Greater internal capability:** Enabled the organisation's in-house team to operate the platform independently, reducing reliance on external resources and freeing up time to deliver new functionality rather than maintain existing modules.

OUTCOME HIGHLIGHTS



Successful Platform Modernisation

Used the KA2 Smarter Framework to deliver the organisation's agreed business outcomes.



Reduced Technical Debt

Removed unnecessary complexity to support a more agile delivery model and reduce reliance on external support.



Standardised Platform

Adopted recognised good practice and standard functionality, with zero customisation, to support future upgrades and capability adoption.



Streamlined ITSM Processes

Improved process lifecycles, accelerated change approvals and supported faster request fulfilment.