

Client

Global financial services firm headquartered in Australia

Problem

- > Bank request processes not fully aligned with AT&T ITIL-based best practices
- > Self-service request methods not available for all services
- > Requestors using on-standard and work around processes
- > Many request types required manual intervention and “human middleware” to fully execute
- > Voice recording processes not fully aligned with Dodd-Frank requirements

Project Gestalt Scope

- > Identify request issues and probable causes
- > Develop and lead program to address high priority issues

Technologies

Cisco Request Center, BMC Remedy, BMC Atrium Orchestrator, Software AG, webMethods, and AT&T eBond

Solution

Existing IT service request processes and systems at this global bank needed to be transformed to better integrate with outsourced services provided by their vendor AT&T. The goal was to improve customer service while freeing up resources at the bank and AT&T, who had been required to direct and control the work in a detailed manner.

Project Gestalt President Neil Jacobson provided project management, business analysis and solution architecture services to define and lead the Request Management work stream to accomplish these goals. Neil led the 20+ bank and AT&T staff transforming the IT service request process to better align with AT&T’s ITIL-based best practices. As a first step, the team confirmed the service catalog and request process for services delivered by AT&T, BT and IPC in the service categories: IT security infrastructure, network infrastructure, IP telephony including Dodd Frank-driven voice recording. The engagement was of global scope: Neil drove alignment among stakeholders in Sydney, Hong Kong, London, and the US; coordinated input from SMEs in Sydney and the US; and led development, testing, and deployment executed in Manila and the US.

Selected Achievements

Established Agile-inspired methods for defining and delivering process and system solutions for continuous, measurable improvements.

Developed and implemented a new RFI process to replace manual email / spreadsheet communication processes with managed queues saving time, providing quicker response times, improving quality, and allowing KPI-based management of response time, resolution time and queue size.

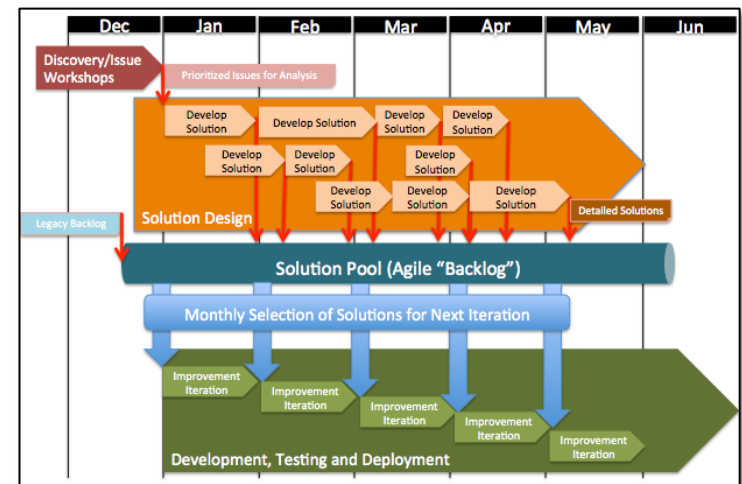


Figure 1: Agile Methods for Solution Management

Interesting Project Facts

- > The Request Management project included 34 separate work packages, many with multiple deliverables
- > The project answered to many “clients” including 5 separate service owners, the AT&T service management team, the bank risk management group, and the technology group responsible for FIX client on boarding
- > The project generated 74 fully-defined work items in a work pool of improvements that can be implemented as resources become available
- > A team of up to 30 people located in 13 locations across Australia, Southeast Asia, the United States, and Europe accomplished the project work.
- > Request processes touch 8 separate enterprise systems at the bank and AT&T

Worked with bank service owners to validate and update the Service Catalog of outsourced services to include missing services. Confirmed request pathways for each service, and defined a roadmap for aligning request processes, and for adding self-service request methods where none existed. Created the service “Rosetta Stone” that maps each service to the AT&T service line code and price catalog.

Drove agreement on streamlined request approvals as a way to improve turn around times by 22% for the high volume voice services. These requests represent 32% of all requests to AT&T.

Developed, piloted and implemented a new fast track process that reduced by 75 % the time required to implement connections to on board new FIX clients. The new process includes up front peer and quality reviews improving request quality, as well as system-supported methods for interaction between the bank and AT&T engineering on change requirements. Implemented request-specific processing within AT&T to by-pass normal FIFO queue processing to fast track these revenue-related requests.

Updated the WebMethods-eBond system interface to create a file containing full request details in a more structured format to help the AT&T recipient understand the request, and eliminate the need for AT&T to navigate between multiple notes in their systems to see all request details.

For Dodd-Frank-related voice recording services, implemented process and systems changes to improve service delivery time, to enforce efficient coordination between AT&T and the third parties providing voice recording services, and to align with compliance requirements.

Updated the high-volume firewall update process to fix and improve the presentation of change details in AT&T’s system to reduce requests for more information and improve service quality.

Improved the process for accessing the AT&T Business Connections knowledge-sharing portal by providing requestors with information on portal content and organization.

Implemented system integrations to remove requirement for time-consuming and error-prone “swivel chair” and other avoidable manual processes.

Developed system fixes enabling efficient work routing within AT&T, and to make cost center available for inclusion in electronic billing files to support recovery accounting at the bank.