

# Service Portfolio Management–Server Lifecycle Management Initiative.

## Financial Banking Industry.

Our client, a Global Fortune 500 Financial Services company with over \$12 billion in annual revenues, offers a wide range of financial products and services in the retail and investment banking industry.

Mergers, acquisitions and reorganization of services resulted in a demand for establishing a comprehensive overview of how offerings are related to services, which are requested via a service catalog.

## **Situation.**

The Service Portfolio Management (SPM) Team engaged Windward Consulting as a result of their expertise on the ServiceNOW platform and ITSM, for assistance in the Service Offering consolidation efforts driven by a requirement to build consensus of key terms such as, Service Offerings, Services (Business Services, and Technical Services), Business Applications and Technical Applications. The client wanted to enforce across the enterprise a unique requirement to develop understanding of the relationships between Services, Services Offerings, Service Catalog and Request.

The financial services company wished to implement policies, processes, and technology changes to drive consistency across the CMDB. As a part of this effort, the client was undertaking a Server Lifecycle Management (SLM) Program to define a consistent process across the enterprise. The goal was to increase maturity to the CMDB to ensure that complete and accurate data was available for stakeholders to use to support other ITSM processes such as Incident, Change, and Problem Management.

## **Approach.**

Windward Consulting provided a Service Mapping / Configuration Management SME to represent the SPM team in the SLM Program. This resource acted as liaison between the SPM team and the SLM Program, capturing requirements and gathering data from SLM for Applications and Services. This resource brought the requirements from SPM into the SLM Program workstream to ensure when building new servers or decommissioning existing servers the Service and Application portfolios are updated accordingly.

## **Outcomes, Values and Recommendations.**

Windward resource mapped over 100 technical services and service offerings which were delivered to the service catalog team. The technical services listing spanned more than 80% of the total enterprise IT services including, network, database, security, mainframe and end user computing across two countries (US and UK).

Provided training and assistance to directors,

technical service owners, and management with the understanding, development and implementation of technical services.

Established templates, relationships, relationship types and import rules for deployment of configuration items into the CMDB.

### **Additional Benefits.**

A unified server lifecycle process also brought about additional benefits, including but not limited to:

- 1.** Automating deployment of consistent, template-based, configurations of servers.
- 2.** Ensuring compliance to standards and consistency across the environment.
- 3.** Reducing the manual labor required to deploy or reclaim servers.
- 4.** Enabling fast, reliable patching of servers through common practices.
- 5.** Facilitating a consistent retirement process to ensure clean, fresh data is populated in the CMDB.