



BT Financial Group

- » BMC orchestrates productivity gains for financial services company
- » Estimates savings of \$250,000 over three years

BEFORE

- » Key tasks in on-boarding account creation process took seven minutes
- » Bulk user on-boarding a manual process, lacking automated workflow
- » Testing environment refreshes required 20 hours of dedicated engineering support

AFTER

- » On-boarding key tasks reduced to 10–15 seconds of time
- » 50 Bulk user on-boarding tasks completed in roughly same time as one
- » Application testing environment refreshes are now completed in 10 minutes
- » Calculated cost savings of \$80,000 in year one and \$250,000 over three years
- » Process workflows can be scheduled as discrete tasks and executed on demand



GEOGRAPHY

Australia and New Zealand

INDUSTRY

Financial Services

SOLUTIONS

BMC Atrium Orchestrator
 BMC Performance Manager
 BMC Event Manager
 BMC Service Impact Manager

Business IT is a relative newcomer to process automation. Whereas automotive and heavy equipment manufacturers have used software to smart-wire products and eliminate wearily repeatable tasks from engineering processes, IT management, until recently, had not adopted a similar approach to automating IT activities.

Industry awareness of the significant resource and quality benefits from automation is rising quickly. The big news for business is that significant chunks of repetitive work can be automated. Financial services company BT Financial Group got to work with the BMC Atrium Orchestrator platform, driving down costs and significantly reducing the number and duration of manual and repetitive tasks from infrastructure support and maintenance.

BUILDING TO BSM

BT Financial Group roundly adopted BMC Software's Business Service Management (BSM) — a comprehensive approach and unified platform for running IT that reduces cost and maximizes business impact. An earlier push for ITIL alignment gave impetus to a programme of technology adoption that has progressively pieced together BMC Service Assurance and Automation technologies. The division's manager of environment and release management, Craig Wiseman, works in BT's 500+ IT organisation and is a key figure in the group's infrastructure team. Wiseman says that the group's 14-month BSM journey has been systematic, commencing with incident, problem and

change management, before moving to configuration management. “You can try to tackle configuration management, but if you don’t have tight incident, problem and change management, configuration management is extremely difficult. These are the foundations of the service management framework,” he says.

BT’s mix of VMS, Unix and Wintel server technology supports a sizeable cast of Oracle, SQL, Sybase and Java applications across 400-plus servers. The company’s first experience with BMC solutions was with proactive monitoring and management provided by BMC Performance Manager. BT uses this for database and application level monitoring — functions like database alerts, and monitoring external websites to capture a picture of page errors, or when URLs fail to respond in a timely manner. From here BT adopted a blend of event and service impact management systems, which are consolidated in BMC Event Manager where roughly 10,000 alerts a day are filtered and prioritised. The system will soon extend to virtualisation and SAN monitoring.

BT’s infrastructure team is dedicated to support and maintenance activities and, keen to avoid swamping support teams with alerts, BT saw tremendous value in BMC Event Manager’s ability to streamline much of the inflow, intelligently regulating the volume and frequency of alerts. BMC Service Impact Manager came next. “We realised we had to look at how events impacted services we provided to the business.” The next logical step in their BSM journey was to look at process automation.

“The potential money we’ve saved after one year is \$80,000. Over three years it is the best part of \$250,000. The next six months will see more quick wins, especially as we automate more complex software release and deployment.”

CRAIG WISEMAN
MANAGER ENVIRONMENT AND RELEASE MANAGEMENT

AUTOMATION

In painting the backdrop to BT’s recent automation initiative, Wiseman says reducing repetitive manual tasks is paramount to obtaining the highest value from skilled workers. “Our business is to provide quality financial services, so we must ensure that we consistently deliver high quality service to our business. They must be able to depend on us and we need to be confident that our processes are being followed correctly, regardless of whether Tom, Dick or Sally has performed the activity.”

ON-BOARDING

The question was where to start? Not wanting to “boil the ocean” BT targeted on-boarding new employees, a hitherto onerous process involving the security administration team in a 46-step process to create a new user account. Wiseman explains: “It’s a very labour intensive holistic process. Failing to deliver those accounts on time can be a very poor experience for someone’s first day” he says. “To make it happen people worked over weekends or in the evenings.”

In choosing BMC Atrium Orchestrator, Wiseman says intuitiveness and ease of use were key decision factors and the opportunity to apply a process across multiple platforms was a key advantage. He further highlighted out-of-the-box functionality for developing a library of functions that can be stored and re-used for multiple processes. A proof of concept spanning a portion of the on-boarding process — including creation of an AD account, addition to appli-

cation and security groups and email account creation — took less than two days to implement. The results were startling. What once took seven minutes was completed in just 10-15 seconds. But more importantly, Wiseman says, is certain flexibility that manages associated workflow as a scheduled task, which can run overnight, or on demand. The early success has encouraged BT to undertake a number of bulk user on-boarding tasks — up to 50 per cycle — which are completed in roughly the same time it took to complete one manually.

TESTING AUTOMATION

Time and effort slashed from refreshing testing environments for BT's investment portfolio platform (Wrap) — a web-based application — has been significant. An application this critical undergoes continual development, requiring pre-production testing to ensure consistency and quality in what is released to production while minimising customer impact. To get the job done, BT currently runs five pre-production testing environments. Refreshing environments prior to each phase of testing was taking the best part of one week, including up to 20 hours of dedicated engineering support. Refreshing the environment at least 10-12 times a year made the job significantly taxing. "A skilled engineer running manual tasks repeatedly for three-to-four days is not the most effective use of that skill set or knowledge," he says, further highlighting compliance and audit benefits.

Wiseman compares the process to painting the Sydney Harbour Bridge. "No sooner had you finished one refresh than you had to start again on the next environment."

Using BMC Atrium Orchestrator to connect manual processes, the Wrap system refresh now takes just 10 minutes. How so? The process begins after a restore of the Wrap database has been applied to a testing environment. There are a number of steps requiring completion — things like uninstalling production certificates, installing test environment security certificates checking the appropriateness of security in acceptance environments and deploying software packages. Other tasks could include changing account passwords to preserve the integrity of testing and production copies. The process was manual, requiring someone to sit down and run scripts, connecting all the manual processes, watching one finish before initiating the next.

Wiseman says successful automation is predicated on mature change management and extracting workflow information from people. "It's really about asking the right questions and getting the decision points and process logic that people store in their heads.

SHOW ME THE MONEY

Wiseman's assessment of value echoes fictitious sports agent Jerry Maguire's exchange with Arizona Cardinals wide receiver Rod Tidwell, in the seminal movie *Jerry Maguire*. Says Wiseman: "One approach to estimating and prioritising the dollar benefits of task automation is 'show me the money'. However, there is an equal focus on automation for high risk/impact activities, where the dollars may not add up."

He applied hourly charge-out rates to four variables to measure estimated return from new process automation in BT's Wrap application testing environment refresh: Time taken to complete tasks prior to automation; task completion time post automation; task frequency; and time taken to actually automate the task. "We kept it very simple. The potential money we've saved after one year is \$80,000. Over three years it is the best part of \$250,000." Wiseman says. Although admittedly a rudimentary initial assessment, he says a more rigorous measurement

will revisit ROI when automation has matured. However, the early signs are encouraging, when only two processes have made such an impact.

Over the next three-to-six months Wiseman expects to automate more of the process for staff on-boarding. Similarly, Wrap refresh automation will be further extended, including a re-usable release process for software deployments in testing environments. Performing 600-to-700 deployments yearly, savings should be significant. Windows infrastructure maintenance is also on the horizon. Wiseman explains: "After monthly weekend maintenance windows, we want to know on Sunday, rather than have our business inform us on Monday morning, if we've still got a problem. In fact, we want to take immediate action in the maintenance window. We see Atrium Orchestrator as crucial to delivering that," Wiseman says. Longer-term, virtual workstations and server provisioning and deployment will be explored. "We will look at automating some of our more complex software deployments, possibly even in a production environment. We want to share the success we've had across our other technology business units," he says.

ABOUT BT FINANCIAL GROUP

BT Financial Group (BT) is one of Australia's strongest wealth managers, with more than \$95 billion in total investments. The wealth management arm of the Westpac Group, BT's core business is providing investment, superannuation and retirement income products, administration services, financial advice, and insurance solutions, through a range of leading brands.

BUSINESS RUNS ON IT. IT RUNS ON BMC SOFTWARE.

Business thrives when IT runs smarter, faster, and stronger. That's why the most demanding IT organizations in the world rely on BMC Software across both distributed and mainframe environments. Recognized as the leader in Business Service Management, BMC offers a comprehensive approach and unified platform that helps IT organizations cut cost, reduce risk, and drive business profit. For the four fiscal quarters ended September 30, 2008, BMC revenue was approximately \$1.83 billion. Visit www.bmc.com for more information.



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