

Desjardins Group

Leading Canadian financial group adopts best-practice business processes and significantly increases operations availability with Micro Focus® Service Management Automation.



Overview

Desjardins Group, based in Montreal and Lévis, Canada, is the top cooperative financial group in Canada. In order to normalize its mission-critical processes and compete effectively in the demanding financial industry, Desjardins orchestrated a thorough corporate transformation, utilizing Micro Focus Service Manager software and Professional Services Organization. The Financial Group is now poised to acquire and assimilate companies

"After Micro Focus helped us normalize and adopt best-practice business processes, our quality of service, across the board, was tremendous. We experience significantly increased operations availability, greater efficiencies, and improved productivity. Most importantly, we enhanced our ability to responsively and lucratively support both our internal and external members."

TRUNG QUACH

Director IT
Desjardins Group

as needed and to deliver exceptional financial products and services.

Challenge

Micro Focus and Desjardins Transform Financial Group for Future Growth

In a major corporate initiative, led by Monique Leroux, chair of the board, Desjardins, Micro Focus Professional Services Organization (PSO) worked closely with Desjardins' senior management, and IT staff to transform the Cooperative from the top down. With more than ten separate IT silos, and as many ways of doing business, the Cooperative understood it needed to undergo a large and highly complex corporate-wide IT transformation. The transformation is designed to improve governance and normalize processes, as well as standardize, consolidate, and centralize its IT infrastructure and resources. It was also crucial that Desjardins emerge from this daunting transformation with industry best-practices, calculated to help maintain its unique and distinguishing cooperative customer culture, and further its competitive reputation in the global financial industry. In charge of rolling out this ambitious project within Desjardins, are Robert Ouellette, CIO, Chadi Habib, CTO, Nicolas Coulombe, Vice-President Operation, and Trung Quach, Director IT.



At a Glance

- **Industry**
Financial Services
- **Location**
Montreal and Lévis, Canada
- **Challenge**
More than 10 IT silos, leading to 10+ sets of standards, processes, and definitions
- **Products and Services**
Service Management Automation
- **Results**
 - + Supported increased number of IT services with existing resources.
 - + Improved customer service and products through best-practices and normalized processes.
 - + Reduced number of yearly IT incidents by more than 30%.

“Having to support 10+ sets of standards, processes, and definitions was making it challenging for our IT staff and resulted in lower efficiencies than were needed to increase our competitive position,” recalls Quach. “Our team was inundated with growing disconnects caused by non-standard ways of managing everyday processes, such as incident and ticket resolutions. Micro Focus PSO and Desjardins became a finely tuned team, resulting in a successful and complex corporate transformation. We’re now the Cooperative we want to be going into the future.”

In order to accomplish its ambitious transformation, Desjardins decided to seek out and engage a provider with a deep experiential knowledge-base, and carried out a thorough evaluation of the major IT vendors. After the dust had cleared, Micro Focus was selected. It was a choice that has paid off exponentially for Desjardins and, according to Quach, one that has led to a valued “virtual” partnership.

“Micro Focus Service Manager was the only software out there that delivered the required functionality and we were impressed by the depth of knowledge and real-world success that Micro Focus Services had with similar contracts,” adds Quach. “We found that Micro Focus is singular in its understanding of global-scale business process and best practices. Their staff is indistinguishable from Desjardins employees, they’re onsite, and they are very proactive and responsible.”

Solution

First the Process, Then the Tools

The business transformation and process normalization, and the IT standardization and consolidation took place in two phases. The first step was to create and establish best-practice business processes, in accordance with those published by the IT Infrastructure Library (ITIL). The second phase was migrating

multiple custom environments from Micro Focus Service Manager 7.11 to the latest Service Manager in order to manage the IT infrastructure and new processes, while also consolidating the disparate IT environments.

Desjardins took the lead in phase one, analyzing and normalizing its new standard, business-driven processes, but soon discovered that Micro Focus Professional Services had a great deal of expertise to add to the project. What ensued, according to Quach, was a very effective two-way collaboration and knowledge transfer.

“We hired Micro Focus specifically to guide us on developing the best business-case processes and standards possible—and then we really listened,” says Quach. “Our onsite Micro Focus staff worked with Desjardins upper management and IT staff daily to implement this ambitious transformation. Micro Focus fosters a productive team synergy, which results in a very proactive, significant, and ongoing improvement in our business operations.”

Results

Benefits Abound

Once corporate processes were normalized, and the second phase of the migration to Micro Focus Service Manager was in place, Desjardins began to tally up a large list of instant benefits. The IT staff was able to improve availability dramatically and mitigate Desjardins’ risk exposure. The IT department can now comply and maintain quality practices and regulatory requirements in an easily managed environment, while providing critical visibility to senior management. Desjardins is seeing significant bottom-line operation efficiency and agility gains, and can now support a notably increased number of IT services with existing resources.

In addition to improved performance, the new version of Micro Focus Service Manager also

supports Self-Service Portal for all types of requests (support, IT services, etc.), and a more robust interface (introducing web 2.0 technology).

“Basically, Service Manager allows IT to effectively administer our service lifecycles from end to end, which increases efficiency dramatically,” continues Quach. “IT staff is free to support business-critical quality improvements designed to increase our competitiveness and make happier customers. We can channel all this newfound energy and efficiency into expanding and building the business.”

Building the Business through Acquisition Agility

As an example of how Desjardins can now focus on the art of business building, Quach describes a recent acquisition, a strategy the Financial Group utilizes for increasing its customer services and products. Early this year, Desjardins initiated the purchase of State Farm Canada in a cooperative deal that will make Desjardins the second-largest property and casualty insurer in Canada. In addition, the Financial Group is buying State Farm’s property and casualty and life insurance business, as well as its mutual fund, loan and living benefits portfolio.

“Prior to our Micro Focus-backed transformation and standardization, integrating State Farm Canada and its network of 1,700 employees would have been a nightmare,” emphasizes Quach. “One of Desjardins’ strategic objectives is to expand insurance distribution across the country and develop business opportunities with mutual and cooperative organizations. It is such a pleasure to know that assimilating new companies is now a straightforward and efficient process. We can really focus on our critical business strategies.”

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Micro Focus Lends More Than a Hand

As mentioned, prior to the corporate transformation, the Desjardins IT team spent many unnecessary hours trying to manually track and correlate incidents, recent fixes, scheduled changes, upgrades and customer issues. Currently, the number of yearly IT incidents is reduced by more than 30%.

Desjardins is now positioned to accomplish its full potential. It's good for a Financial Group to dream. But it's even better to have a way to carry out those dreams.

“It's almost incomprehensible to consider running Desjardins without our new best-practice governance guidelines,” concludes Quach. “Micro Focus gives us more than arms and

legs, they give us dedicated expertise and loyal teamwork. I can't imagine how we managed our IT environment before our Micro Focus-aided corporate transformation. We now have the resources to deliver excellent customer service and increased IT value. Basically, I just can't imagine doing my job without our Micro Focus partnership.”