EAGLE INVESTMENT SYSTEMS
Delivering high-value business services to internal and external customers from the cloud

ESSENTIALS

Business Challenge
Deliver services that efficiently meet the business requirements of external and internal customers

EMC Solutions and Services
- EMC Global Services: EMC Consulting and EMC Education Services
- Standardize and align IT infrastructure with business services
- Accelerate the adoption of ITIL v3 service management practices for incident, problem, and configuration management
- EMC Symmetrix VMAXe enterprise storage

Results
- Using ITIL processes and tools within six weeks
- MTTR improved by 60 percent for some services
- Defined business services with granular KPIs
- Greater agility to align value and cost of service

GROWING ASSETS EFFICIENTLY

Many of the world’s leading financial services firms rely on solutions from Eagle Investment Systems to streamline the investment process and deliver greater value to their clients. Eagle ACCESS™ is a private cloud service that provides secure access to integrated data management, investment accounting, and performance measurement solutions—while minimizing the need for firms to purchase and maintain their own hardware and software.

SERVICES-CENTRIC TRANSFORMATION

Eagle Information Services, which provides IT services to Eagle customers and the company’s internal business users, continually strives to deliver more value at less cost.

"We’ve been making the transition from a technology-centric to a services-centric organization,” says Mike Fitzgerald, managing director and head of Information Services at Eagle. "We’re building out a private cloud, tightly coupled with Eagle ACCESS, to deliver services to internal customers as well.”

The challenge is in being able to cost-efficiently deliver business services that meet a wide range of requirements. The storage services required by the company’s R&D department, for example, run to basic commodity storage provisioning—whereas U.S. Federal Government customers require high-touch, high-tier managed storage services with security controls that comply with the Federal NIST and FISMA standards.

“To become agile enough to meet different requirements at competitive price points, we needed to do two things,” says Fitzgerald. “One was to standardize and align our infrastructure through the entire technology stack—from the data center, to compute, through the storage fabric, and up to technology operations. The other was to mature our management discipline and operate IT as a business.”

TACTICAL STORAGE TURNS STRATEGIC

With 12 of the company’s 15 SANs approaching end-of-life, Eagle had already begun tactical discussions with EMC® about new technologies. The focus soon shifted, however, and the two companies began working together on a strategic, standardized, and virtualized tiered storage fabric architecture to support Eagle’s Infrastructure as a Service (IaaS) objectives for years to come. The architecture leverages EMC Symmetrix® VMAXe® and Fully Automated Storage Tiering for Virtual Pools (FAST VP) technologies to automatically tier customer data based on performance requirements.

The capability makes it easier for Eagle to provide reliable, predictable performance for its customers.

"Just as important as a standardized infrastructure was the toolset we gained, such as EMC ProSphere™ storage resource management, built right into the Symmetrix Management Console, which enables us to manage allocation of storage to the business services—without having to add incremental staff,” says Fitzgerald.
ITIL V3 ADOPTION IN SIX WEEKS
At the same time, Eagle was looking for help implementing IT services management practices that would enable it to operate IT as a business.

"We reached out to analyst and research firms to compare services and we considered multiple providers," says Fitzgerald. "We found that EMC Consulting ITIL and ITIL adoption practices were very reputable. It made sense to work with the same company to align our infrastructure service and to help with our transition to ITIL."

Eagle engaged EMC Consulting to accelerate the adoption of ITIL v3 for incident management, problem management, and configuration management. EMC began with a baseline maturity assessment—across people, process, and technology.

"Unlike consulting firms that present recommendations at the executive level, the EMC team came in, rolled up their sleeves, and became deeply entrenched in our operations," says Fitzgerald. "They sat beside the process owners and process managers and learned about what they do. They established themselves as a trusted voice for employees—rather than a threat—and helped interpret what we, as managers, needed to hear."

Based on the maturity of the existing operations, EMC consultants developed a step-by-step roadmap for ITIL v3 adoption. Then they helped Eagle implement it.

"EMC provided fast-track templates and tools that helped Eagle accelerate the formalization and standardization of its processes," says Fitzgerald. "We didn't have to author our new policies and procedures or workflow diagrams from scratch. EMC enabled us to onboard ITIL process flows, procedures, and an ITIL management toolkit within six weeks."

“EMC consultants understand Financial Services—and the complexities and demands of data management, risk management, and meeting regulatory requirements. They accelerated our ability to build better solutions that better serve our clients. Engaging EMC Consulting as a business partner has proven to be exceptionally beneficial for Eagle.”

Mike Fitzgerald, Managing Director, Eagle Investment Systems

TRAINING, CERTIFICATION, AND CULTURE SHIFT
EMC also delivered the ITIL v3 Foundational training to all Eagle Information Services employees—three-quarters of whom are expected to be ITIL-certified by the end of the year.

"EMC delivered a comprehensive ITIL training program that was customized and contextualized with what we required at Eagle," says Fitzgerald. "The training was presented by an EMC consultant who had worked on implementation with Eagle process managers and process owners from the beginning."

Like many service organizations, Eagle Information Services personnel were justifiably proud of their willingness to do "whatever it takes" to meet customer needs and solve problems.

"Organizations should not underestimate the shift in culture required to move from a technology-centered organization with ad hoc processes to disciplined service management," says Fitzgerald.
“EMC did a very good job helping people see how more formalized, standardized, and proactive processes would improve both the quality of service and their work/life balance,” Fitzgerald adds.

**MEAN-TIME-TO-RESOLUTION IMPROVED BY 60 PERCENT**

"Eagle is now running IT as a business and seeing the results," says Fitzgerald. "Our Mean-Time-to-Resolution (MTTR) has already been improved by as much as 60 percent for some services.”

One of the most powerful changes has been a shared ITIL framework spanning operations, infrastructure, R&D, and vendors—and even extending into some client organizations.

“The ability to articulate problems in common vernacular that can be appreciated, understood, and acted upon by all parties helps everyone find a resolution in a much more efficient manner," says Fitzgerald.

Standardized classification of incidents has enabled more accurate trending, for faster recognition of problems. Now Eagle can proactively identify and manage problems, even when incidents occur over long periods of time; detecting patterns that otherwise would have been missed.

**ALIGNING VALUE AND COST OF SERVICE**

Many Eagle clients are in the process of rolling out ITIL themselves and are using Eagle ACCESS as a means to mature their own organizations.

"By federating our ITIL practices with our clients we have been able to extend standardization for incident, problem, configuration, and change management into the customer’s organization,” says Fitzgerald.

Eagle is also considering using the ITIL framework to extend its incident management system to customers, so that they can open tickets and check status directly.

“We think that this could be another differentiator for Eagle in the marketplace,” says Fitzgerald.

With this new agility and flexibility on the back end, Eagle is able to upgrade or downsize services to more precisely and efficiently meet external and internal customer requirements.

“Now, instead of one-off solutions and one large service, we’re delivering a menu of services, with key performance indicators (KPIs) at a much more granular level,” says Fitzgerald.

The organization is also able to better assess and analyze the business services it offers in terms of cost and value.

“EMC consultants understand Financial Services—and the complexities and demands of data management, risk management, and meeting regulatory requirements,” states Fitzgerald. “They accelerated our ability to build better solutions that better serve our clients. Engaging EMC Consulting as a business partner has proven to be exceptionally beneficial for Eagle.”
“If services deliver a tremendous amount of value to the business, we’re okay with them being more costly and complex to manage,” adds Fitzgerald. “On the other hand, we’re targeting and qualifying other services for greater automation or self-service, to bring costs down.”

Looking back over Eagle’s experience so far, Fitzgerald reflects, “There’s no easy way to begin the transformation of IT to a services-centric organization. You need to gain the commitment of everyone in the organization, at all levels—which is difficult to do on your own. The objective view of an independent, expert partner like EMC Consulting really helped us accelerate and succeed in the adoption of IT as a service.”

CONTACT US

To learn more about how EMC products, services, and solutions can help solve your business and IT challenges, contact your local representative or authorized reseller—or visit us at www.EMC.com.