

# Enhancing Services Operations

## Case study

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### Abstract

*A global technology supplier had implemented a company-wide system to manage its services operation. Implementation was troublesome and the company was now questioning whether they should keep the system or replace it.*

*ChangeBEAT established that the system could meet the business requirements and ran a programme to enhance processes, train users and standardise systems usage.*

*The company now has a globally consistent approach to managing its services operation, standardising on best practice across the world.*



## Background

A global technology supplier had implemented a company-wide Professional Services Automation (PSA) system. In EMEA local culture and working practices had made the implementation troublesome and now its use was sporadic: management distrusted the reports it produced and questioned the business benefits. The company was questioning whether they should keep the system or replace it.

They engaged *ChangeBEAT* to review the business requirements and establish if the system could meet them. *ChangeBEAT* reported that it could and worked with the customer to build the business case that proved it. The team recommended a number of major changes and proposed that these should be integrated into a change programme: the customer asked *ChangeBEAT* to run it.

## The approach

A key component to the programme was the sensitive management of, and communications with, the different stakeholders around Europe. Not only was each country different in its approaches and practices, but the country management had a high level of power and autonomy.

- *ChangeBEAT* had already carried out a high-level analysis of the affected processes and people, when building the business case. They built on this to agree the shape and plan for the programme.
- *ChangeBEAT* ran a series of workshops to develop, refine and agree the proposed future processes.

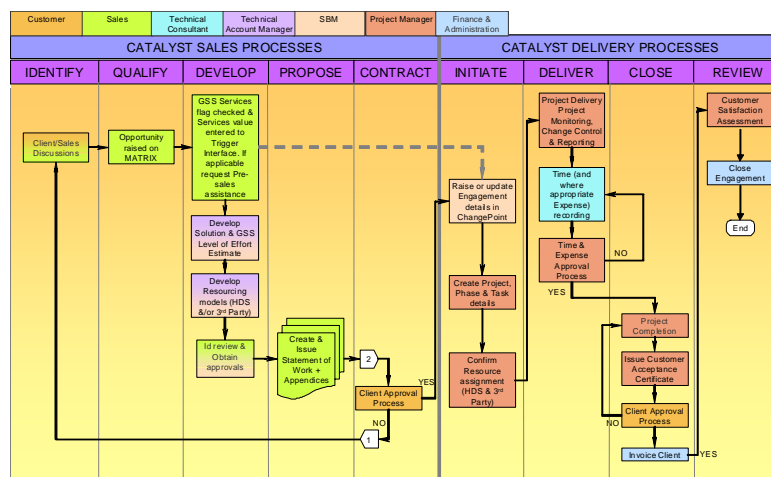


Fig 1: A process map was created which also acted as the front end to locate more detailed tools, guides and procedures.

- The team built the detailed process definitions and training materials and ran a one-country pilot to test and enhance them.
- They then rolled out the training and processes across Europe.



- Throughout they were carefully managing stakeholder relations and communications – both upwards to the programme steering board and outwards with the individual countries.

A key to the success of the programme was that the countries should trust in the information generated by the PSA system. *ChangeBEAT* developed a data integrity report both to clean the data and to maintain its accuracy.

The system now generates a set of key management reports covering project performance, profitability, personnel utilisation, and sales wins and losses. Confidence in the system is such that these have become the standard for management information and reporting: they have replaced the previous spreadsheet-based system.

### How did *ChangeBEAT* help?

*ChangeBEAT* made use of *WingBEAT*<sup>™</sup>, its methodology for change, to plan and manage the programme. It based the process definitions on its industry best practice process model, *ExecKIT*<sup>™</sup>. These materials allowed *ChangeBEAT* to make a fast start and to focus on the key imperative of sensitive stakeholder management.

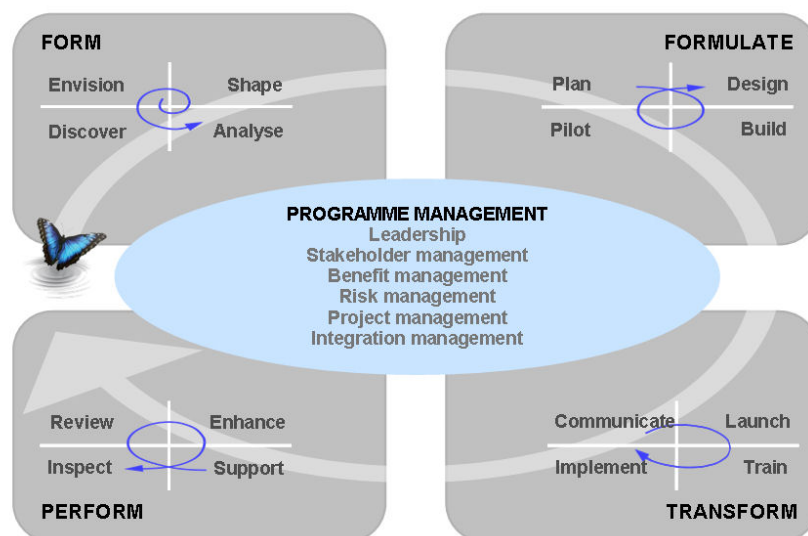


Fig 2: *WingBEAT*<sup>™</sup>: *ChangeBEAT*'s change management methodology.

### The results

The company now has a globally consistent approach to managing its services operation. It can capitalise on best practice across the world, make informed business decisions based on reliable information and, not least, satisfy the regulators with its processes and reporting.



### What the customer said

The European Solutions Director said, “*ChangeBEAT* helped us to identify how to increase utilisation, reduce costs and squeeze incremental revenues from our delivery team, just by properly exploiting systems investments we had already made!”



*ChangeBEAT defines, develops and executes change programmes that help achieve enduring business benefit rapidly and reliably. Our people have practical field experience, and are equipped with WingBEAT, our proven change methodology, and our extensive tools. We are professional, pragmatic and action oriented.*

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