

IT Service Excellence at Oregon PERS Makes Retirement Sweeter

**Profile:**

Manages retirement benefits for employees of Oregon's state agencies, universities, school districts, and local governments.

Location:

Tigard (Portland), Oregon

Industry:

Government / Financial Services

Solutions:

- Ivanti® Service Manager
- Incident Management, Service Request, Self Service, Knowledge Management, Problem Management, Change Management, Release Management, and Discovery

Benefits to Oregon PERS:

- Adopted IT service management best practices to enhance IT service quality and efficiency for this major state agency
- Introduced self service with more than 50 service requests
- Changes and new releases are tightly controlled and successful
- Built the foundation for DevOps with continuous integration and deployment
- Leveraged a common service management platform for IT, business analytics, data quality, and facilities for added efficiencies

From firefighters to teachers to county administrators, hundreds of thousands of people count on the Oregon Public Employee Retirement System (PERS) to manage their retirement benefits and provide health insurance for themselves and their families.

Ensuring that PERS can serve its members quickly, efficiently, and with the highest levels of customer service depends on the flawless operation of its core retirement application and other IT systems.

An ITIL Mandate

Improving IT services to increase efficiency and control was a top priority identified in the agency's five-year strategic plan. An internal audit recommended the adoption of the ITIL framework and an enterprise-class IT service management platform to better control IT changes.

Bryan Wynn, who led the agency's helpdesk and desktop support teams for nearly a decade, took up the ITIL and ITSM mantle. "We wanted to get a better handle on managing changes," says Wynn, ITIL/ITSM specialist at Oregon PERS.

PERS needed a service management platform that would support the migration to ITIL and could be easily customized to fit the unique needs of managing retirement benefits, which requires meeting complex financial rules and laws and providing transparency to the public.

The agency evaluated the leading IT service management platforms, and ultimately decided to upgrade from HEAT Classic to Ivanti® Service Manager, deployed on-premise.

Better, Faster Customer Service

PERS took a phased approach to IT service management. It rolled out service request and incident management in 2015, and since then, continued to mature ITIL practices and expand service management beyond IT.

"We really like that Service Manager is well-aligned with ITIL and it's so customizable," says Wynn. "You can adapt Service Manager the way you need it to be."

Ivanti Service Manager is used across all IT functions, including the service desk, desktop computing, infrastructure, applications, and database. Soon, the business analytics team and the facilities department will also use Service Manager. The agency relies on the solution for Incident Management, Service Request, Self Service, Knowledge Management, Change Management, Release Management, Discovery, and Service Level Management.

"It's not about the size of your organization, it's the maturity," says Wynn. "We're not a big organization, but we need a lot of security and controls around our processes, and Service Manager allows us to raise our maturity levels."

Self Service Streamlines Support

When employees or contractors have a problem with a printer or need a new application set up, they no longer need to pick up the phone or send the first in a series of emails to get the issue resolved or request fulfilled. Migrating to Service Manager enabled IT to offer the agency's staff rich self-service functionality. Employees use the self-service portal to report incidents or choose from more than 50 service offerings.

For a public agency with decades of operations, there was some adjustment to self service. Employees and contractors were accustomed to firing off emails to the helpdesk, not thinking about the nuances between an incident and a request. "It was a big shift for the agency to not just email the helpdesk and we would create a ticket for them," says Wynn. "But everyone has picked up on it very well."

Offering self service has improved IT service quality and consistency for employees and streamlined the work for the service desk. IT continues to enhance the self-service portal, improving usability and adding functionality.

In the past, when a staff member wanted software installed or access to an application, for example, the manager had to submit the request. Now, with automated workflows in Service Manager, the request is sent automatically to the staffer's manager. "That's helped everyone, because people can submit whatever they need, and if manager approval is needed, the system will handle the workflow on its own," he says.

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— Bryan Wynn
ITIL/ITSM Specialist

Improve Business-Service Quality

The agency uses Service Manager to manage workflow across IT and business functions. A business analytics team, which is responsible for the query, reporting, and analytics for the core retirement application, will use Service Manager to manage requests for new query tools and reports.

Service Manager supports the workflow of the data warehouse team, which is focused on data quality so that employees can request new data management reports through Service Manager.

The facilities management team, which handles maintenance for the agency's offices as well as mail and print services, will soon use Service Manager to handle requests, notices, and incidents. As a state agency, procurement and construction can be complex. "It's not a simple request to fulfill," says Wynn. "But Service Manager had the flexibility so we could create what we needed."

Working with business teams to automate and streamline service requests was an interactive, iterative process. Oftentimes, a common language needed to be established. "When we developed the service request functionality for facilities, we started by helping the business teams figure out what services they offer," he says. "They aren't coming from an ITIL background, so the concept was new."

Tighter Controls over Changes and Releases

Improving the change management process was the catalyst for an enterprise-grade IT service management platform. Since then, it has tightened operational change controls and management of software releases, which ensures that changes and enhancements are implemented successfully and with the right level of control and accuracy.

With the foundation of change and release management in place, IT plans to mature these processes to further minimize the impact of change-related incidents and improve service quality. "End-to-end change management from request all the way through deployment is one of our next big plans," he says. "Service Manager will enable that."

Embrace DevOps

The agency recently created a DevOps team to help IT and developers collaborate better so that the retirement

application can be enhanced, tested, and new functionality released faster and more reliably. IT plans to integrate Service Manager with JIRA software from Atlassian and other development project management tools to handle software releases faster and more collaboratively.

"We're moving toward continuous deployment, and we need to be able to roll out continuous changes," says Wynn. "Getting Service Manager integrated with JIRA and other development and monitoring tools is critical."

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Asset Management

PERS uses Ivanti Service Manager Discovery to automate asset discovery and inventory management. With Discovery, all computers, servers, printers, and switches across the organization are discovered and inventoried automatically to support auditing requirements. That information is critical to build rich Configuration Item profiles so IT has full visibility into its servers, desktops, and other devices to support the service management lifecycle.

Measuring Improvement

The agency has adopted an outcome-based management approach, and the robust reporting available through Service Manager support those goals. "The agency has developed metrics that relate to our mission to process paychecks to retirees," he says. "We're redesigning our metrics to align with that. It's not just about IT metrics such as how many tickets we took or resolved, but how those metrics relate to our agency mission."

A Trusted Relationship

Ivanti has been a strong partner for PERS throughout its service management journey. Wynn has worked closely with Ivanti support and taken Service Manager administrator courses as he developed and deployed Service Manager modules—and is also an active member of the Ivanti (former HEAT) customer community.

"I've been able to figure things out or find a way to do things that are pretty cool," he says. "Service Manager is very powerful. When people ask if we can do something, I've almost always been able to find a way."

Lesson Learned

IT service quality and efficiency continue to grow. Employees can have IT issues fixed faster and get the digital tools they need to do their job swiftly and with minimal friction. Tighter control over IT changes means less downtime, and faster software releases means more functionality in the hands of employees and members alike.

But lessons were learned along the way—the language of IT is not always the language of business. "When I first built the service catalog, I looked at it from the perspective of what does IT need to fulfill this request," he says. "Make sure you work closely with your business to figure out services and the categories," he advises. "We had to get their view on what we do, not our view of what we do."



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