



AEGIS Insurance adopts modern IT service management solution

The AEGIS IT Office of the CIO consists of PMO, IT Governance, Compliance, IT Finance, Service Management, IT Strategy, and Procurement departments. The IT team wanted a modern solution for service management but also wanted capabilities to meet their needs in project management, compliance, IT finance, and other areas. Self-service and transparency for IT and its internal customers were also needed.

“The business case and the value proposition of having one integrated system to manage the majority of our processes was a no-brainer,” said Himanshu Pandya, Sr. Manager, AEGIS.

“We realized that we could do a lot more a lot faster with ServiceNow,” said AEGIS IT Project Manager Steve Sikora. AEGIS IT understood how much it struggled with unstructured email, phone calls, and centralized documents, such as spreadsheets in the course of its day-to-day business. They wanted a better way to systematize and automate work requests and processes. “It’s about productivity and the ability to monitor and track the world that you’re responsible for,” said Paul Hartmann, Compliance and Security Manager, AEGIS.

Business solution

AEGIS began using the ServiceNow® Service Automation Suite to run the business of IT. They also wanted to create a centralized portal for employees to make various requests solve issues through a knowledge base, check the status of requests, and find information during an emergency. Once AEGIS automated their IT functions, they quickly realized the potential of ServiceNow as a platform to automate other business processes.

“We went to the three-day admin class for ServiceNow and we had the Incident Management and Change Management applications up and running a month later,” said Sikora. Within a month, ServiceNow was live for IT. From there, the team began developing a centralized self-service portal and started creating custom applications on the Now Platform® to meet specific business needs.



Highlights

Insurance company success with IT service management leads to demand for more across the enterprise.

Headquarters

East Rutherford, New Jersey

Geographies

North America

Employees

200+

Business

Insurance

Challenges

- Needed a modern ITSM solution
- Needed project management, compliance, and IT finance capabilities
- Needed self-service and transparency for IT and internal customers

Solutions

- ServiceNow® Service Automation Suite
- ServiceNow® Change Management
- ServiceNow® Incident Management
- ServiceNow® IT Governance, Compliance, and Risk
- ServiceNow® Problem Management
- ServiceNow® Project Portfolio Management
- ServiceNow® Vendor Performance Management
- ServiceNow® Facilities Service Automation

Applying service management across the enterprise

- **Out-of-the-Office Management** – Rather than simply depending on away messages generated by each person's email account, AEGIS can centrally manage out-of-office scheduling and approvals. Previously they had used a custom developed tool, but they found it too limiting since the workflow and forms functionality were too basic. The application they created on the Now Platform is essentially a record producer with a back-end table containing 28 different reasons why an individual can be out of the office.

Workflow behind these reasons assigns an appropriate approval process—for instance, vacations are handled differently than an education request. Everything can be tracked and reported through a dashboard and analyzed in various reports. Calendars can show others when a person is out of the office for planning purposes or to help track someone down. The application will integrate with HR and payroll systems as well.

- **Governance, Risk, and Compliance (GRC) for IT** – Using the ServiceNow® IT Governance, Risk, and Compliance application, the team was able to start monitoring IT compliance and risk by importing the entire IT risk matrix as well as their controls and control tests into ServiceNow. Then the team could create both the manual and automated controls needed to ensure compliance. Now, everything is integrated within a single system.

"When someone looks at a policy from an audit perspective, they are also looking at risks, controls, and control tests, and they can validate that we are testing for the policy," said Hartmann. Chain of command and separation of duties can be validated with a single look.

- **Business Continuity and Emergency Preparedness** – Through the self-service portal, the team developed an anytime, anywhere, disaster-proof way of getting essential information to dispersed employees and provide business continuity through the request and approval functions. Having lived through the disruption from Hurricane Sandy, they wanted to ensure that the company would run without interruption, even during a catastrophe. The site provides information based on the role and level of each employee. In addition, evacuation and recovery plans were developed and can be pushed out to the portal as appropriate. Other emergency documents are also delivered through the portal.
- **Security Tracking and Monitoring** – With some customizations to ServiceNow® Problem Management, the team created a way to track and monitor security-related incidents. AEGIS needed the ability to track everything from a lost iPhone to attempted hacking attacks. This facility gave them the ability to assign cause and track resolution of the security incident to the appropriate individual or group.
- **IT Financial Management** – With customizations to the out-of-the-box financial management application, the team developed various financial applications such as:
 - **IT Budgeting** – A fully functional budgeting tool that, for the first time, gives the CIO online, real-time budget information without having to wait for the information to be generated and supplied via a spreadsheet. This updated application allows the IT managers to input their budget information, based on budget lines, and provides the IT Finance person the ability to enter actuals against budget lines.
 - **Purchase Orders (PO)** – AEGIS modified the out-of-the-box PO module of Asset Management and is now utilizing it for generating Purchase Orders. The one missing piece was the printing capability that was addressed by utilizing a solution available on the ServiceNow Share site for sharing applications and application components.

Results

Company is moving away from email, phone calls, and spreadsheet apps to an automated system, profoundly changes the way work gets done there.

- **Vendor and Contract Management** – All of the company's IT vendors are managed via the ServiceNow® Vendor Performance Management application along with their respective contract. The integration between Contracts, Vendor and Financial Management functionality further validates the benefits of the ServiceNow platform.
- **IT Project and Portfolio Management (PPM)** – With customizations to the ServiceNow® Project Portfolio Management application, the team has developed an IT Project Portfolio Management app that provides a status of all IT projects at a glance. This app allows the appropriate project manager to provide status updates of the projects for which they are responsible and, through the use of an email notification, communicates the status to the IT Leadership group. During the weekly CIO staff meeting, this app is utilized to review status of all ongoing and planned projects.
- **Managing Facilities with Service Automation** – Using the ServiceNow® Facilities Service Automation application, the AEGIS IT team changed the model for making requests or reporting issues to the Facilities Division from an email- and phone call-based process to an employee self-service portal.

In addition, emails from employees to Facilities can be automatically converted into facility requests. These requests are then automatically assigned to Facilities team members. Urgent issues are prioritized for immediate response. Also, the workload and performance of each team member can be easily tracked. Now, the manager has insight into what each person is working on, how quickly they were able to respond to requests, and how long various issues took to resolve.

Conclusions

Service Management is now part of the AEGIS IT strategy. AEGIS IT understood how an automated service model could apply to most every department and function within the company. Moving away from email, phone calls and spreadsheet applications to an automated system—where everything is integrated by a single data model and management structure—profoundly changes the way work gets done.

It also brings a new level of reporting and understanding. Moreover, the cloud-based SaaS delivery model of ServiceNow is considered a significant benefit.

"Almost all of the time we spend on ServiceNow is to develop or test enhancements to features and functionality. We don't have to spend any time dealing with the server configurations, patches or upgrades. To me it doesn't get any better than this from a productivity and time-to-market standpoint," said Pandya.

Demand for Service Management is spreading across the company. Based on the success with the Now Platform, other divisions have begun asking for solutions.

"For us, getting this rolled out shows that the product works beautifully. It's growing organically," continued Pandya. "If a group is using a spreadsheet to maintain data and organize work, it should be brought into ServiceNow. That makes it actionable, and we can track it and report on it," added Hartmann.

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