



IBM Service Management helps Swiss Re IT make ITIL best practices actionable

Overview

■ Challenge

Provide scalability, flexibility and quality of service to support a demanding IT environment in a global organization

■ Solution

Use IBM Service Management solutions to integrate change and release management into a central deployment process based on IT Infrastructure Library® (ITIL®) version 3 best practices

■ Key Benefits

Consolidated 40 change processes into one for increased efficiency; enabled move from ITIL v2 to ITIL v3 via a central deployment process; helped support compliance with internal and external requirements for service changes and new releases



As a leading global reinsurer, Swiss Re offers financial services products that enable risk taking essential to enterprise and progress. The company operates in more than 25 countries and provides its expertise and services to clients throughout the world.

New insurance acquisitions have driven tremendous growth at Swiss Re, making it the world's largest re-insurance company.

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– *Heinrich Waldhier, Head of Process Management, IT, Swiss Re*

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To help manage this growth, Swiss Re is moving from a siloed, manual approach in managing key IT processes to an end-to-end service management model in which IT processes are standardized, automated and aligned with business needs.

“IT should not be an inhibitor to growth,” explains Heinrich Waldhier, head of process management in IT at Swiss Re. “Our executives expect IT to be there and that we manage it efficiently and effectively. Whenever it’s possible, we try to automate processes to ensure that we have sustainability for growth.”

One area where this shift can be seen is in the organization’s handling of change and release management processes. It’s not unlikely that during a single weekend IT staff must implement between 200 and 1,000 IT changes. Problems can arise and availability of services or information can be compromised when unforeseen resource conflicts occur.

Swiss Re’s environment includes more than 300 three-tiered Web services running on IBM WebSphere® Portal and IBM WebSphere Process Server along with dozens of applications from

IBM, PeopleSoft, SAP and others.

These applications depend on both mainframe and distributed resources running a variety of operating systems (Linux®, Sun Solaris, IBM AIX®, etc). The company’s mainframe environment performs nearly 30,000 MIPS (million instructions per second).

In improving change and release management processes, Swiss Re staff sought to:

- *Align best practice processes for software delivery with business requirements to accelerate development and deployment of new services.*
- *Predict IT requirements for new business services and assess how changes will affect service availability.*
- *Automate previously manual processes to help ensure that necessary tasks occur on time as planned, reducing manual labor and the risk that errors are introduced in the environment.*

“We have such complexity that we needed to create standards for how we approached service changes and new releases,” says Waldhier.

Improving scalability, flexibility and quality of service

Working with IBM, Swiss Re began its journey toward an IT service management model that will enable Swiss Re to achieve the scalability, flexibility and quality of service it requires.

Throughout this process, IBM Global Technology Services and IBM Lab Services partnered with Swiss Re staff to provide implementation support as needed and to help develop a comprehensive IT governance framework that would enable staff to advance from ITIL v2 to ITIL v3 best practices.

Using IBM Rational® Method Composer software, the Swiss Re staff could quickly document its change and release management process designs and implement best practices based on ITIL.

Additionally, through specialized workshops, IBM worked with Swiss Re management and IT staff to evaluate the company's policies, enhance its IT governance solution and define guiding principles. From this, the team created an IT governance handbook that aligns IT processes with business needs and clearly outlines roles, responsibilities and governance processes. IBM also

created a process maturity model, an action plan for future expansion of the IT governance policy and a scorecard that helps the company evaluate its new processes.

Following the establishment of standard processes through which change managers and developers could request changes and release managers could deploy those changes, the company began evaluating vendor tools that would help automate asset management, configuration management, change management and release management processes.

“When we started to speak with different vendors, we saw that the most important part is the change and configuration management database,” says Waldhier. “We chose IBM because it had the ability and knowledge to help us standardize data configurations and change histories. IBM is the only company covering the whole scope we wanted to address from business process design to application development to operational infrastructure.”

Using IBM Tivoli Change and Configuration Management Database, IBM Tivoli Release Process Manager, IBM Tivoli Provisioning Manager and IBM Tivoli Asset Management for IT

Solution Components

IBM Service Management Solutions

- Service Request Management & Fulfillment
- Server & Application Provisioning & Release Management

Solution Components

- IBM Rational® Method Composer
 - IBM Tivoli® Asset Management for IT
 - IBM Tivoli Change and Configuration Management Database
 - IBM Tivoli Release Process Manager
 - IBM Tivoli Provisioning Manager
 - IBM Global Technology Services
 - IBM Lab Services
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software, the team is creating a fully automated deployment engine based on ITIL v3 best practices that consolidates 40 change processes into one and enables:

- *Application owners to understand the dependencies of their applications and the potential impact on other applications or infrastructure component changes.*
- *Developers to forecast new infrastructure requirements and communicate them to IT staff. In cases where new technologies are needed to support an application, staff can gain approval early in the process to avoid unnecessary delays.*
- *Automatic implementation of change requests based on business practices.*
- *The ability to audit all changes in the production environment.*

Mitigating complexity improves productivity

By standardizing processes and sharing information for configuration, change and release management, Swiss Re has been able to deploy new services and service changes faster and with fewer errors. In fact, some service changes that previously took days to deploy can now be completed in just 10 minutes.

“Proper impact analysis is now possible using IBM Service Management software to support our change and release management processes,” says Waldhier. “Because Tivoli Provisioning Manager can be integrated in the planning process and applications can be

deployed automatically without manual intervention, we can improve staff productivity and accelerate deployment times.”

Additionally, by gaining a consolidated infrastructure view, developers gain greater insight into the underlying environment and can develop new services to run on existing resources rather than requiring new technologies.

“To build a new platform is a very complex and expensive undertaking,” adds Waldhier. “Whenever it’s possible, we try to avoid it. If an application developer uses our existing infrastructure, then the only cost to us is in added capacity.”

Supporting regulatory requirements

These changes have also been essential in helping Swiss Re meet regulatory requirements and minimize risk. The organization adheres to a number of pan-European and country-specific regulations, including Sarbanes-Oxley Act (SOX) to demonstrate to shareholders and customers proper management of policies and financial operations. By creating a framework and standardizing

and automating the deployment of changes, with a clear audit trail, IT staff can easily justify changes and adhere to principles set forth in these regulations.

“We now have a consistent business case template for all our services,” says Waldhier. “As a result, we can easily generate a view of events we have designed on the needs of SOX and other regulations.”

And according to Waldhier, these changes are just the beginning. The company is exploring the integration of forms management tools to further streamline these processes as well as expanding service management best practices into other areas, such as problem and incident management, and inventory management.

“By mitigating the complexity of our infrastructure we are becoming more scalable, reliable and flexible,” concludes Waldhier. “We will continue to gain significantly better control of our IT infrastructure through the use of IBM Service Management solutions.”

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