

Charles Stanley

Move to Cloud delivers flexible ITSM in financial services

In the competitive financial services market, effective use of technology and its underlying processes are crucial to success. With the aim of improving and future-proofing IT services wealth management company, Charles Stanley, sought to transform its service management processes, aligning with the ITIL framework on a flexible ITSM platform.

By upgrading its existing Sunrise ITSM platform from on-premise installation to SaaS, Charles Stanley has been able to put in place pragmatic ITIL-based support with faster issue resolution, better management reporting and the ability to introduce new features such as self-service and a configuration management database.





Charles Stanley is one of the leading wealth management companies in the UK, dedicated to serving the private investor. Operating from 26 offices across the country, with 850 staff and a growing online business, Charles Stanley Direct, technology is central to its success, providing the agility it needs to stay competitive.

The company's ICT service team handles around 3000 incident and service request tickets monthly, evenly split between phone and email. Incidents in Sunrise can concern mission-critical application issues, such as those for trading or related to support for the Charles Stanley Direct website and app, or support for desktop applications. Service requests are in turn raised for the team responsible for asset/device ordering and Configuration Management Database (CMDB) upkeep. The ICT team sees particular spikes of activity around quarter end, as the company provides financial reports to its thousands of customers.

An existing user of Sunrise with an on-premise installation, Charles Stanley saw an opportunity to improve processes and align to the ITIL framework, while also grasping the benefits of a SaaS-based platform. As Mike Jones, Head of ICT Service explains, "When I joined in 2018 my mandate was to see how we could improve service management. Improvements to our internal processes were identified to prioritise or track incidents, to enable the team to deliver the performance that the business required."

Pragmatic ITIL to provide agility

The answer was to adopt ITIL effectively and to upgrade Sunrise to its SaaS platform, harnessing its flexible support for the framework and inherent security and scalability. The entire team was trained on ITIL to strengthen internal understanding, and the latest version of Sunrise deployed following extensive workshops to ensure Charles Stanley's processes supported the framework.

"When we looked at the market we quickly realised that Sunrise offered the pragmatic support for ITIL that we required, and that there was more benefit if we moved to SaaS, building on the database and functionality that we already had," comments Mike.

The upgrade saw Charles Stanley adopt the SaaS version of Sunrise, hosted on IBM Cloud and providing the combination of flexibility and security that the company was looking for. "SaaS means I can let the experts deal with the support and maintenance, while my guys can focus on the helping the business," says Mike.

Delivering benefits in reporting and management

The new version of Sunrise went live in 2018 and quickly proved its usefulness to Charles Stanley.

"Initially I think people were surprised when we unveiled the new SaaS platform, as the actual Sunrise interface was very familiar," says Mike. "When they looked closer, they realised that our underlying processes had been transformed. For example, we now have dashboards that give real visibility into our activities, enabling managers and the executive team to track exactly what is happening. My manager could immediately see the value from the new insights."

“ Thanks to Sunrise ITSM SaaS we are now aligned to ITIL and can push this approach through the entire business. All Sunrise users, up to senior management, can see the difference now we have upgraded to SaaS. ”



By leveraging the functionality of Sunrise ITSM the Application Support team were able to dramatically reduce open incidents from 1,500 to under 100 in just three months. Charles Stanley adopted a pragmatic approach to the implementation of ITIL, and has been able to better understand and manage incident, problem and change management. Automation has assisted with email notifications around major incidents, further streamlining activities.

The service management team is now better placed to not only meet its own KPIs, but also to understand and meet the needs of the rest of the business. It is currently working with different departments to set KPIs around areas such as time to deliver a laptop in order to set meaningful, business-focused goals. Sunrise is also being adopted across the wider business, with Finance department planning to adopt the platform to manage suppliers and contracts, while the end-client support team for CS Direct web business is also migrating to Sunrise.

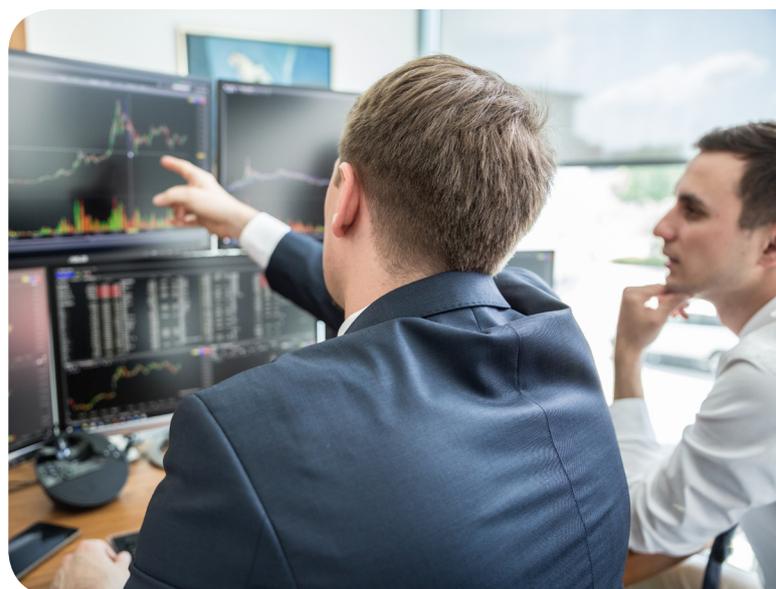
“Sunrise allows us to monitor everything in a much simpler, better way – without it we would struggle to track issues for example,” adds Mike. “It really provides a toolbox to fit to our needs and allows us to adopt a more agile, ITIL-based approach. We now have a solid foundation to build on going forward.”

Enabling self-service across the business

With the improved processes on the SaaS model bedded in, Mike and his team is introducing a web self-service portal for users. This is backed by an extensive knowledge base that automatically recognises and provides relevant answers as soon as users enter their queries. The aim is to reduce phone and email requests significantly by making solving a query or raising a ticket as easy as possible. Mike says, “Our initial brief for self-service was clear – we wanted it to be as straightforward for users as writing an email. We are now planning a pilot before rolling out across the organisation. Once it has been successfully adopted we plan to add more functionality based on user needs.”

With an extensive IT infrastructure, Charles Stanley is now deploying Sunrise’s Configuration Management Database (CMDB) to get a better understanding of all its assets, enabling the team to improve visibility and save time when investigating incidents.

“Thanks to Sunrise ITSM SaaS we are now aligned to ITIL and can push this approach through the entire business,” concludes Mike. “Not only have we improved how we handle our workload, but we can demonstrate our success through more detailed, business-focused reporting. ICT senior management and users of Sunrise ITSM can see the difference now we have upgraded to SaaS.”



Our customers

A wide range of customers uses Sunrise for a variety of different purposes, from ITSM and MSP or external customer Service Desks to HR and Facilities Management.

Read more case studies from public sector, not-for-profit and commerce at www.sunrisesoftware.com/customers/

About Us

Sunrise Software has over 20 years' experience building and implementing service management software that enables organisations to support both employees and external customers. Sunrise is designed to meet industry best practice and is easily configurable to meet individual organisations' specific needs. The platform is browser based, notably easy and intuitive to use.

Sunrise ITSM is suitable for IT departments providing technical and support services, while applications are available for Shared Services and external / third party Customer Service, as well as HR/ Payroll and Facilities Management. The software is available as a Software as a Service (SaaS) solution on the IBM Cloud platform, or on-premise, and is used and trusted by hundreds of high profile organisations in public sector and commerce.



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with the SDI Standard



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