

Horizon21 invests for the long-term with VMware Service Manager

HORIZON21

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KEY HIGHLIGHTS

Customer

Horizon21

Industry

Finance

Challenges

- Implement ITIL processes to support rapid business expansion
- Find one integrated solution for diverse IT and IS requirements

Key Solutions

VMware Service Manager for Incident/Problem/Known Error management, CMDB, Configuration Management, Change Management, Automated Workflows, Knowledgebase and Customer Portal.

Benefits

- Seamless communication between IT, IS and 3rd party service providers
- Complete visibility of call histories and dependencies
- Change Management protects system and services availability
- Automation speeds up key approvals
- Full audit trails for compliance

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Since its formation in 2004, Horizon21 has established itself as a premium brand within the investment management industry. Horizon21 is an integrated investment manager, based in Pfäeffikon SZ, Switzerland, covering a broad range of investment topics for institutional and private investors. Beyond hedge funds and private equity, Horizon21 puts a primary focus on themes such as the BRIC countries, commodities and resources as well as infrastructure investments and insurance-linked securities. For sophisticated private clients Horizon21 offers wealth management services. True to its name, the company specialises in exploring new investment horizons, identifying megatrends and pioneering new asset classes and has built a reputation for capitalising long-term investment opportunities

Keeping pace with market demand for its services has resulted in rapid expansion, and today Horizon21 employs 150 people in six locations including Zurich, London, Hong Kong, Bratislava and the Cayman Islands. However, the growth of the last few years has also placed new demands on the company’s IT infrastructure and services model.

According to Chief Technology Officer Daniel Sidler, “Horizon21 grew rapidly from a young company, where informal IT processes were more than effective, to a larger, more sophisticated international operation. We realised that in order to contribute proactively to business success, we needed to formalise our working practices and find the right tool or tools to streamline IT support and service delivery.”

A fully integrated solution

The IT operation consists of two distinct teams, IT infrastructure and Information Systems (IS) for application support and services, with disciplines such as system engineering outsourced to third party service providers. Basing their new IT processes on ITIL best practice, the company embarked on a ‘voyage of discovery’ in search of a solution that would support its diverse requirements.

“At first we thought we might need two completely separate tools,” continues Sidler, “A basic ‘ticketing’ and inventory system for IT infrastructure problems and a more service-centric solution for IS. However, during an in-depth evaluation, we discovered that the holistic approach provided by VMware Service Manager, would more than meet our individual needs, and also provide a conduit for seamless communication across IT and with our outsourced partners as well.”

Having selected VMware Service Manager following a series of test installations featuring three vendors, Horizon21’s initial goal was to get an integrated Service Desk

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up and running as soon as possible. Working with VMware consultants and trainers, it took just four weeks to go live with Incident and Problem Management as well as the Configuration Management Database (CMDB). Out-of-the-box integration with Active Directory enabled single sign-on to the Service Desk with customised CMDB screens set up for IT and IS users. One month later a customised branded portal was rolled out to customers with around 70% of calls being logged by this means today.

Transparency at every level

Today, using VMware Service Manager, calls are automatically assigned to the most appropriate officer group following pre-set rules, whereas previously customers would informally email officers, who could well be out of the office or otherwise unable to handle the call. A complete history is visible for every call, ensuring continuity of service in all events. Furthermore, target response times can be set according to call type and priority; for instance, service calls are opened within a day and high priority incidents within the hour. Customers can also track the progress of their problem or request via the customer portal.

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The new Service Desk supports more than fifty Services including industry-related applications, along with a range of essential hosted applications provided from Partners. Technical officers now use the CMDB to view each Service’s history and dependencies when troubleshooting and to assess the impact of changes prior to implementing them, ensuring that routine tasks such as installing software patches no longer cause disruption.

“Our systems engineering partner is also set up as a user of the service desk of Horizon21, allowing them to view and manage our service requests,” explains Sidler. “Now, when we need to install a patch, we simply log a call which is then automatically assigned to an available officer at the external company. This seamless way of working is much more efficient and provides complete transparency. For instance, when it comes to reconciling invoices at a later date, we can easily drill down to see exactly what was done and when.”

Automating compliance

VMware Service Manager has also made it much easier to enforce and prove compliance. As an example, the VMware team has created customised workflows to manage the process of granting and revoking access rights to sensitive information in file repositories. The workflows provide full audit trails to speed up the whole process of obtaining appropriate authorisations from information owners, while ensuring that line managers have complete visibility of the requests made by their staff.

“In the highly regulated environment of Horizon21 where external and internal audits are an everyday occurrence, the ability of IT to automatically provide audit trails at no extra cost has been invaluable,” comments Sidler. “A recent external auditor’s report singled out the progress that has been made by the maturing IT organisation of Horizon21 – a success, in the words of our own internal auditor, directly attributable to the new VMware Service Desk.”

With numerous projects active at any time, Horizon 21 has also started to log collaborative projects in the CMDB, streamlining the approval process and providing visibility of the full history at any point. The statistics that IT now produce using VMware Service Manager’s powerful reporting have also provided a firm basis for resource planning and discussions with business stakeholders.

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“Having installed the new Service Desk over a year ago it’s fair to say that the power and visibility provided by the CMDB has been nothing short of a revelation,” he concludes.

