client info
at a glance

Company:

Fortune 100 Diversified Financial Services

Industry: Financial Services

Company Overview:

Financial services company that provides banking, insurance, investments, mortgage, and consumer and commercial finance through thousands of stores and tens of thousands of ATMs and the Internet across North America and internationally.

Business Value:

Cost avoidance, integration, automation

Finance Giant Cuts Costs and Finds Simplicity in Data

"I had a slew of questions and needs thrown my way from management," said the IT manager, "and of course they wanted simple answers immediately. It's easy to make those requests, but not so easy to deliver on them."

The difficult demands stem from the fact that this financial services company analyzes and manages an immense amount of data travelling through more than 30,000 servers and virtual machines. Data is sourced from its servers via various tools such as BMC, HP OpenView, a CMDB and its Service Desk. The company has dozens of data centers and a large mainframe installation as well as petabytes upon petabytes of storage.

Tracking capacity and performance risk is critical. "Being a financial services organization, we get audited moment to moment," he said. "We need to have evidence, for example, that a capacity risk was identified on time, remediated, and accepted."

The IT manager piled on his own demands for whatever tool they brought in to help deliver on the requests. He wanted repeatable processes and flexibility. He wanted a tool that "lets me do it my own way, however I want to do it."

One of my problems was I didn't want to take data from one tool and copy and paste it in Excel to go into another tool, only to correlate it and throw it out there," he said. "I wanted no-nonsense, one-stop shopping."

He found TeamQuest Surveyor, the one tool that helped him provide context to the capacity questions asked by the business leaders.

The organization quickly realized the power of TeamQuest Surveyor after optimizing its existing footprint by virtualizing underutilized systems and physical servers. As a result, it reduced its VM configurations to match the true workload, and conducted a massive server consolidation project. His team integrated performance, capacity, and asset data into a single, unified analysis tool. The capacity planners created repeatable processes that reduced errors, reduced senior staff time, made new staff effective from day one, and made junior staff productive without years of training.

> "An impressive 70% of analysis is now completed automatically and delivered in a human-readable report."

Automating success

An impressive 70% of analysis is now completed automatically and delivered in a human-readable report. This reduced staff time by more than 95% per report. Gone are

the days of cutting and pasting data into Microsoft Excel to build charts. Analysts spend their time analyzing reports instead of creating them. And staffing is flat over the last several years while massively increasing work volume.

While the organization uses many tools for configuration information, change records and trouble ticketing, TeamQuest Surveyor pulls that information together into a single, analytical report. It integrates data sets from BMC Performance Assurance, HP OpenView, VMware Virtual Center, EMC Control Center, Remedy, and custom capacity tools, yet is smart enough to adjust reporting to reflect the differences between platforms, data types and metrics. For example, the same report that analyzes a physical server's CPU activity can also analyze a VMware virtual server's CPU activity.

None of this requires copying and pasting or data replication of any kind.

Data from tens of thousands of servers and thousands of applications is pulled together and analyzed with a staff of only a few capacity planners. Automated monthly reports identify capacity risks for specific applications and contain only the actionable information, not pages and pages of irrelevant details.

> "Business leaders don't understand workloads, transaction classes and all that stuff."

In one project, his team quickly analyzed tens of thousands of servers to determine what could be virtualized. The team automatically generated a report which tested a server for virtual candidacy, allowing them to understand its resource consumption, and determine the size of VM that was required.

Give the business context

"Business leaders don't understand workloads, transaction classes and all that stuff," he said. "Sadly, for my customers, it isn't easy to understand high-level forecasting methods."

To give the business a better understanding of the environment in their own terms, the IT manager translated his IT information into fixed costs, variable costs, and other business vernacular.

"I'm a U.S.-based financial institution. Most of our work is during bankers' hours because we're a bank, so just before and just after business hours is our lowest, quietest time. Those are my fixed costs," he explained. "Variable costs are the change from that line to the peak of the day. How busy did we get that day and what's that difference between fixed and variable? I compute headroom based on how much that change can increase before I run out, before I hit a threshold or some other rule that I've determined. And then I jam all that into an automated TeamQuest Surveyor report."

> "The team automatically generated a report which tested a server for virtual candidacy, allowing them to understand its resource consumption, and determine the size of VM that was required."

So now he has a forecasting method that is a repeatable, automated process inside a single tool. His team simply selects the server or set of servers, selects a time period, pushes the go button, and out pops all the answers the business and IT could ever want.

The organization's capacity management team has successfully delivered on its mission to reduce, optimize, consolidate and virtualize across the enterprise. "We now have powerful, repeatable processes and analyze faster and easier," he said.

They found their tool that provides tremendous flexibility, seamlessly integrates data from existing sources, and automatically delivers actionable information in reports. And accomplished their mission.

About TeamQuest Corporation

TeamQuest Corporation is the global leader in IT Service Optimization (ITSO), specializing in Capacity Management software. TeamQuest helps IT organizations consistently meet service levels while minimizing costs and mitigating risks. By combining performance data and business metrics, TeamQuest software enables IT organizations to provide accurate, objective information as input to critical business decisions. Companies around the world trust TeamQuest software to help them proactively improve service delivery and support best practices.

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