



Bayview Financial Holdings, L.P.

Transforming IT service management to support business agility, innovation, and risk taking

BEFORE

- » Manual approvals delayed fulfillment of service requests and implementation of IT changes
- » Process and documentation gaps prevented full compliance with SAS 70 requirements for change control
- » Previous solution lacked automated means of handling incident tickets, placing a huge burden on the help desk
- » Physical inventories were required to maintain an accurate record of IT assets

AFTER

- » Streamlined processes and automated tools allow approvals and even submission of incidents/requests from anywhere
- » Comprehensive, fully documented system brings together people/process/technology to satisfy SAS 70 requirements
- » 70% of incidents are submitted by e-mail and self-service; 100% of all IT monitoring system-generating incidents are routed automatically to the appropriate group
- » Automated discovery and asset tracking provide insight into configuration and financial information related to assets



GEOGRAPHY

United States

INDUSTRY

Financial services

SOLUTIONS

BMC Service Desk Express Suite

BMC Service Desk Express

Change Management

BMC Service Desk Express Client Services

BMC PREMIER PARTNER

IT Prophets



Information technology is an integral part of the mortgage finance business. The leaders in this industry are the companies that have figured out how to leverage IT to its fullest. Bayview Financial Holdings, L.P. is one of those leaders. One of Bayview's basic tenets is to "foresee change, and adapt quickly." Innovating, taking risks, and sharing ideas to improve the company are key elements of that tenet.

Bayview's IT organization supports agility and innovation with a sophisticated IT infrastructure that runs more than 140 business applications. These applications address all aspects of the company's business, from asset management, loan servicing and lending to human resources.

Under the guidance of Emron Goolcharran, vice president of IT Global Services, Bayview set the stage for future growth by undergoing a major overhaul of its IT service management environment. The initiative involved streamlining processes and replacing its outdated help desk and change management tools.

Solutions from BMC Software are at the heart of the IT service management overhaul. BMC Service Desk Express solutions provide IT Infrastructure Library® (ITIL®)-compatible incident, asset, and service level management; work orders and purchase requests; a workflow engine; dynamic forms; real-time reporting; and dashboards. They also enable developers and managers to assess proposed changes, approve them, and dispatch work orders, bringing greater efficiency and control to Bayview's

change process. Moreover, they improve service quality and cuts costs with self-service for reporting incidents and submitting and approving equipment, service, and change requests.

From the beginning, Bayview has relied on the skills and expertise of BMC partner IT Prophets to help plan and implement the solutions. “Our relationship with IT Prophets is helping us fully exploit the BMC solutions across the entire business,” Goolcharran said. “We’re stretching the product in many directions — always looking for ways to put it to work on the business side so that we can increase our return on investment and avoid the cost of acquiring, managing, and maintaining multiple point solutions.”

STREAMLINING AND AUTOMATING CHANGE

Prior to implementing the BMC change management solution, IT managed change with a workflow set up in Lotus Domino. But there was no way to automate approvals, so critical changes were sometimes delayed when managers were traveling or in meetings and unable to keep the approval moving forward. With the help of IT Prophets, Bayview has implemented a comprehensive process that automates change requests, assessments, testing, and approvals. This process will include automatic notifications when a change is scheduled and when the change is completed.

The change management application is particularly beneficial for the development staff. System availability requirements of the business mean that IT can roll out changes only on Wednesday and Saturday nights. In the past, this limitation placed a burden on developers because the readiness of code for production is difficult to estimate precisely. Once code is ready, rolling it out quickly is critical, making rapid turnaround on approvals vital.

Because the BMC solution is flexible, Bayview was able to tailor change request forms to minimize the amount of data that must be supplied at the time a request is initiated. The system automatically creates a change assessment, which the developer can complete over time as code development progresses and additional information becomes available.

Once the assessment is complete, the request is immediately routed for approval. Escalations alert management if approvals do not occur within established service level agreements. Upon approval, all affected areas of IT are notified and the request is routed to the appropriate parties for implementation.

Finally, the change management solution closed process gaps that previously existed with respect to demonstrating adherence to documented processes. As a result, IT Global Services now complies with Statement on Auditing Standards No. 70 (SAS 70).

GOING MOBILE

While the new change process increased efficiency and strengthened compliance, Bayview still had a hurdle to overcome. Approvers were often away from their desks. Although the process included primary and secondary approvers, changes were still sometimes delayed because no one was available to authorize them within the change window.

“Our relationship with IT Prophets is helping us fully exploit the BMC solutions across the entire business. We’re stretching the product in many directions — always looking for ways to put it to work on the business side so that we can increase our return on investment and eliminate the cost of managing and maintaining multiple point solutions.”

EMRON GOOLCHARRAN
VICE PRESIDENT OF IT GLOBAL SERVICES

But Goolcharran had a vision. “Everyone in IT has a BlackBerry,” he noted, “and everyone keeps their BlackBerry handy wherever they are. It’s been one of my goals for more than a year to have people perform critical tasks from wherever they happen to be. We’ve already integrated BlackBerry access into the approval of service and equipment requests. Soon, people will also be able to check in and see what changes are waiting for authorization and immediately make the decision to approve or reject them.”

OPENING THE DOOR TO SELF-SERVICE

BMC Service Desk Express is providing robust incident management functionality that has enhanced IT response to end-user issues. Of the 3,000 tickets generated each month, 70 percent are submitted by e-mail. 100% of all incidents generated by IT monitoring systems are routed automatically to the appropriate group. As a result, the number of calls that service desk agents must handle has dropped dramatically. Moreover, they improve service quality and cut costs with self-service for reporting incidents, managing HR processes, and submitting and approving equipment, software, service, and project requests.

The client services module has helped Bayview achieve further reductions in service desk call volumes by enabling end users to submit incidents and requests through a browser. Self-service is still in its infancy at Bayview. However, Goolcharran expects usage to grow as the staff works toward its goal of transforming the self-service interface into a fully functional service catalog. “We want to make it look more like an eBay or other interfaces that people are accustomed to using outside of work,” he explained. “That’s one of the keys to getting wider adoption of self-service technologies.”

Bayview employees can also submit service and purchase requests through the self-service portal. Automated workflow routes their requests for approval, and purchase requests then flow into the purchasing module, streamlining the purchasing process and speeding fulfillment.

FOCUSING ON CONTINUAL IMPROVEMENT

In line with Bayview’s commitment to continual improvement, the IT staff makes a concerted effort to continually assess and fine tune IT service management processes. Additionally, the staff constantly seeks new ways to apply the functionality of the BMC solutions to other areas of IT and to the business as a whole. One example is the initiative to use the BMC ticketing, workflow, approval, and self-service capabilities to create an automated on-boarding process for new hires, contractors, consultants, and temporary workers.

CUSTOMER’S FINAL WORDS

The asset management functionality of BMC Service Desk Express is creating efficiencies by automating the tracking of IT assets across the enterprise. Asset data is available to the incident management, change management, and purchasing components as well. What’s more, the solution tracks financial data on IT assets. It’s this capability that caused Bayview to deem BMC Service Desk Express a criti-

“It’s been one of my goals for more than a year to enable people to use these mobile devices to perform a variety of tasks from wherever they happen to be. We’ve already integrated Blackberry access into the approval of service and equipment requests. Soon, people will also be able to check in and see what changes are waiting for authorization and immediately make the decision to approve or reject them.”

EMRON GOOLCHARRAN
VICE PRESIDENT OF IT GLOBAL SERVICES

cal business application that is monitored by the global services e-center to ensure continuous availability. "We track millions of dollars worth of purchase orders and other financial data in BMC Service Desk Express," Goolcharran said. "The value of that content makes it an essential tool for running Bayview successfully in a competitive business environment."

ABOUT BAYVIEW FINANCIAL

Bayview Financial is a full-service mortgage finance company that provides a range of products and services, including residential and commercial special servicing, residential and commercial mortgage and securities investing, and small balance commercial mortgage origination. Bayview customers include real estate investors, mortgage companies, banks, savings institutions, and loan and securities brokers. The company sources its business through a network of thousands of financial institutions, mortgage companies, third-party brokers, and advisors throughout the U.S.

ABOUT IT PROPHETS, LLC

IT Prophets is dedicated to providing Innovative Insight into the IT Service Management environments of organizations throughout North America. A proven team of professionals, IT Prophets delivers software products and services that will: transition organizations from a tactically focused to a strategic support maturity model; attain customer centric and business centric IT service management deployments; install large scale BMC Remedy and BMC Service Desk Express (SDE) implementations; enable robust ITSM SharePoint collaboration; deliver reliable integrations; and provide effective Remedy, SDE and ITIL training and support. IT Prophets is a woman-owned business and is headquartered in Atlanta, GA. Visit www.itprophets.com for more information.

BUSINESS RUNS ON I.T. I.T. RUNS ON BMC SOFTWARE.

Business thrives when IT runs smarter, faster, and stronger. That's why the most demanding IT organizations in the world rely on BMC Software across both distributed and mainframe environments. Recognized as the leader in Business Service Management, BMC provides a comprehensive and unified platform that helps IT organizations cut cost, reduce risk, and drive business profit. For the four fiscal quarters ended March 31, 2010, BMC revenue was approximately \$1.91 billion. Visit www.bmc.com for more information.

