

## ITAMS Delivers Comprehensive IT Asset Management Service To Yorkshire Building Society

From procurement to implementation to ongoing maintenance



### Overview

- Large building society with 2,726 desktops spread across the UK in 2 head offices and 208 additional sites

### Industry

- Financial services

### Challenges

- Better tracking of inventory and auditing of IT hardware and software
- Automate the collection of asset data

### Why ITAMS

- Specialist know-how and track record in recommending and delivering a wide range of IT Asset Management tools
- Ability to precisely match customer requirements to best fit IT Asset management tools at a competitive fixed price

### Solution

- Express Software Manager by Express Metrix

### Benefits

- Substantial efficiency and resource gains
- The Society now has 100 percent visibility of its IT estate
- The cost savings are also significant. For example the Yorkshire has saved at least 25 man days in one year on hardware memory upgrades alone.

*When Yorkshire Building Society needed to gain greater visibility and control of its assets across the Windows IT estate, it turned to specialist IT consultancy, ITAMS to help select, procure and implement an automated IT asset management tool, Express Software Manager, in the most efficient and cost-effective way.*

### Background

Yorkshire Building Society is one of the largest building societies with 143 branches and 75 agencies across the UK. It has 2,726 desktops in its IT estate which are spread across two head office sites, both located in Bradford, and an additional 208 sites around the UK including both Society-owned branches and its network of agencies. To support this extensive IT estate, the Yorkshire has a sizeable IT department with 250 technicians, 100 of which are software developers, responsible for building a number of in-house bespoke mortgage and financial systems. The remainder of the IT staff manage the extensive IT estate, delivering and supporting IT services for the business.

### The Quest For Complete Visibility

In early 2007, Yorkshire realised it did not have sufficient definitive information surrounding the IT estate. Scott Robinson, Desktop Services Manager for Yorkshire Building Society, takes up the story:

*"We had a gap in the way we were managing our Wintel IT estate, and we were relying on manual audits to understand our PC hardware and software inventory, software usage tracking and licence reconciliation. However this meant that the information wasn't always accurate, we didn't have a clear view of the software installed on desktop PCs, and we also didn't have automated processes to collect this data."*

With a myriad of software solutions to select from, Scott decided that the Society should enlist some outside expert help. This would allow the IT team to focus on the daily activities and meet the Society's ongoing technology needs.

### Finding The Perfect Partner

In early 2007, Scott Robinson was approached by ITAMS, the UK's leading IT Asset and Software Management Company. Formed in 2002, ITAMS is a vendor independent specialist which provides full service consulting, implementation and support services for organisations wanting to better manage their IT estates in order to reduce cost and risk. Following initial discussions, Robinson recognised that ITAMS had both the expertise and specialist knowledge in place to recommend the best toolset to match their specific requirements.

*"I was immediately impressed by ITAMS' methodology and its bespoke assessment dashboard, plus this was a fixed price consultancy engagement, so it meant that we knew upfront exactly what we were signing. This was important because with some consulting projects, the initial price is often not what you end up paying – I liken it to 'builder's creep'."*

## A Thorough Selection Process

The Yorkshire and ITAMS went through an initial consideration period where the Society outlined what it was looking to achieve and the tools it had identified so far. A questionnaire was sent to the Yorkshire which covered key purchase considerations, objectives and other specific questions to exactly determine its requirements. Armed with this information, ITAMS then researched a wide range of IT asset management tools that either met or part-met these requirements. Scott continues:

*"We didn't have to think about processes or tools. This was all done for us. ITAMS was an invaluable sounding board throughout, providing good advice and assistance. As a result we went through the whole selection criteria far faster than would have been the case if we had tackled it ourselves."*

## ITAMS Service Engagement: Tool Selection Dashboard

All information collated from the initial consultation was populated into ITAMS bespoke tool selection dashboard and the results were presented to Yorkshire Building Society with a shortlist of the top five products. To arrive at this stage all tools went through a scored and weighted, numerical and graphical analysis of requirements and product capability. Three vendors were then selected by the Society and approached by ITAMS to present and demonstrate each product. From start to finish the process was completed within a 12 week timeframe. Scott adds:

*"ITAMS supplied the tools as well as all the initial consulting work. Effectively, they delivered a 'one-stop shop' which met all our requirements and also included the provision of software and licences."*

## Express Metrix Tops The Bill

Yorkshire Building Society decided to go with Express Metrix, a 13-year veteran in the IT asset management market which provides solutions for IT departments that offer greater visibility and control of IT assets. Express Metrix is known for its comprehensive areas of reporting, ease of use and customer support. Its Express Software Manager Professional (Version 7) product won hands down. From initial set up, to performing the full POC was incredibly fast. In addition, Express Metrix was far more flexible in its approach and offered the solution to the Yorkshire on a trial basis in order to ascertain its own validation of the software. Scott adds:

*"ITAMS worked with us every step of the way, conducting a great deal of the discussions and negotiations with the suppliers on our behalf. It was all incredibly smooth, and I have to say that the confidence that we gained from the POC was certainly shown in the ease of the full live deployment."*

Express Software Manager was installed on about 420 Windows servers – this includes both physical and virtual servers. Yorkshire Building Society has 3,168 licences in use and has purchased up to 4,000 clients with the agents deployed across 210 sites. The software has been live since August 2007 and today, Express Software Manager delivers critical information and tools that facilitate the efficient management of PC hardware and software for Scott and his team. Ongoing maintenance and support is provided by ITAMS, delivering consistency in terms of the organisation and people the Yorkshire needs to deal with on a daily basis.

## Delivering Both Control & Versatility

Now Yorkshire Building Society has a far clearer picture of its IT estate. Express Software Manager is used in more areas than was originally anticipated such as the IT Service Desk, IT Finance Department and Information Security, who use it for computer security tasks. Scott continues:

*"We have used Express Software Manager for PC hardware upgrades; for example, we had a requirement to roll out Windows XP which meant that we needed to upgrade the RAM on a number of Society PCs. To complete this task we would previously have*

visited every PC to physically check the hardware and the amount of memory installed. Express Software Manager gave us that information through a single view, detailing how many memory slots were built into each device and how many were currently in use so that we could determine the size of memory upgrade required.

"The main cost savings derived from Express Software Manager are around resource efficiency. To check the amount of memory on all PCs, a task that would have taken 28 man days, now can be undertaken in three to four days.

"Since installing Express Software Manager we have signed a Microsoft Enterprise Agreement and it has helped us enormously to understand our current installed base notably when we come to yearly licensing 'true ups' with the vendor."

### **A Long Standing Relationship**

Scott describes the relationship with ITAMS as excellent with very good continuity of individuals. If problems arise, ITAMS always responds quickly and efficiently. Robinson concludes:

"I found the company very easy to deal with and the consultants have a very good understanding of our requirements. ITAMS provided us with a wide ranging view of the software applications available and real intelligence around the benefits of each solution in a completely unbiased way. In summary, the whole project was extremely slick from start to completion and ongoing maintenance and support from ITAMS has been superb."

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