TRILLIUM

SUCCESS STORY:

Marketing and Financial Group

Engagement: Infrastructure Assessment

Trillium Helps Marketing and Financial Group Make the Most of its Infrastructure

Trillium was approached by a Marketing and Financial Group that offers rewards programs, merchant cash advance programs, and marketing services for dining establishments in the United States. The Group is experiencing growth within its partner network. This has the potential to significantly increase the number of members that will be leveraging the company's product and services along with the demand on its technology infrastructure.

Challenge: Current network infrastructure was not meeting the needs of a growing national partner and member base

Because Trillium's client has a growing partner and member base for its services, which are based all over the United States. Due to that growth, there has been an increased reliance on our client's network in order to respond to user demands. The technology infrastructure needs to be positioned to be flexible and proactive in meeting the needs of its internal users and its partners.

Our Client
A Marketing and Financial Group offering incentive programs

The Challenge
Network issues were impacting the client's ability to grow the member base for its products and services

How Trillium Solved It

Trillium performed a technology assessment including surveying and interviewing network stakeholders, and a staffing, support and cost review to recommend the path forward

Results
IT Strategy, Rules of Engagement, and Definition of Success Metrics are being established to start a path toward network and technology stabilization

Began the path toward aligning the IT organization to Capability Maturity Model Level 2, Managed

Standard metrics and reporting will help to stabilize the path forward

Recently, Trillium's client began experiencing a number of network-related issues. These disruptions have raised questions for our client as to whether the root cause(s) of the disruptions are people, process, or technology issues. Additionally, the increasing demands resulting from growth have created concerns surrounding the risks the company may have with its infrastructure.

Client Management determined that it needed to be proactive and conduct an overall review and assessment of its infrastructure. This included reviewing network architecture and infrastructure designs, as well as reviewing infrastructure operations people, process, tools and technology in order to identify potential technology risks to the organization. The assessment will assist our client in quantifying risks to company stability and growth over a 3-year horizon. Finally, it will allow our client to make immediate decisions about their current network and systems and the organization and processes supporting their technology.

Trillium Solution: *Assessing the technology architecture, infrastructure, and operations to determine a cohesive path forward*

The Group engaged Trillium to review its network technology and processes to make recommendations on potential improvements.

Trillium first interviewed more than a dozen key stakeholders to determine a baseline for how well the network was performing against the client's expectations. Following the interviews, Trillium performed a financial and staffing benchmark analysis. Trillium also reviewed documentation, including architecture diagrams, infrastructure capacity reports, and organizational structure. Also reviewed were a year's worth of trouble ticket data, as well as Payment Card Industry (PCI) and

Service Organization Control (SOC2) audit reports.

The interviews and data analysis led to recommendations that could be used for the Group to have a roadmap to future actions, including:

- Targeting future organizational structure
- Identification of key processes that should be standardized across the organization
- Identification of prioritized factors, their importance, and the Group's current capability levels
- Prioritization of telecom initiatives

Details of the analysis included the following activities:

- Performing an Information Technology Infrastructure Library (ITIL) Baseline Analysis that reviewed the Group's Strategy, Design, Transition, Operation and Continual Service Improvement lifecycle volumes
- Performing a Staffing and Financial Benchmark Analysis against industry standards
- Entering findings into the National Institute of Standards and Technology (NIST) Risk Management Framework in order to weight risk business strategy, and understand probability of occurrence
- Performing Capability Maturity Model Integration (CMMI) Analysis in order to score team and process interoperability

Findings from the analysis indicated that IT strategy is the largest part of the client risk. While the number of infrastructure support resources is in line with standard support models, the IT organization itself lacks strategic alignment with different groups operating with differing degrees of maturity.

Infrastructure operations followed closely behind strategy as contributing to network risk, with ticket closure percentages and timeframes well below industry standards. In addition, IT spending falls above the norm, with limited results. Network security risks were also identified, such as continued support for end of life operating systems, no network segmentation, and no continuous improvement initiatives beyond passing audits.

Trillium's findings indicated that the client's IT organization lacks strategic alignment and different groups operate with various levels of maturity. Following the Capability Maturity Model (CMM,) IT operations need to align to CMM Level 3 (Defined: Processes Characterized for the Organization and is Proactive) due to several key areas being out of alignment (Infrastructure Operations, Architecture & Information, Software Delivery, and Current IT Spend.) Using an iterative walk-before-you run approach, the Group must be aligned to Level 2 (Managed: Processes Characterized for Projects and is Often Reactive) prior to being aligned to Level 3.

The findings and recommendations were consolidated into a report that Trillium presented to key client executives and IT leadership to allow visibility and buy-in across the Group's leadership.

Results: Quick wins to assist in network stabilization, and a roadmap for accountability and improved service delivery

With a roadmap and recommendations, the client will begin the improvement process by starting to implement a number of items identified in the recommendations in order to work toward CMM Level 2. They relate to IT Strategy, Rules of Engagement, and Defining Success Metrics, and include the following:

- Relative to IT Strategy, the Group is starting to align and focus the attention of IT with the business by defining and aligning IT on business risk ranking criteria, compiling the technical debt and analyzing its risk, determining asset replacement lifecycle, determining IT-specific projects/initiatives, and developing and maintaining a remediation roadmap.

- Relative to Rules of Engagement, the Group will define the areas central to the IT organization's forward progress, such as developing prioritizations for user service requests, outage/incident response, and project/initiative requests. They will also measure delivery to expectation and identify and define task automation targets. These will assist in the creation of an automation roadmap and an automation business case.

- Relative to Definition of Success Metrics, the Group will define CMM Level 2 metrics for measuring the success of strategic alignment and prioritization, set targeted baseline goals, and measure and report on iterative progress.

All these will begin to improve overall network and IT performance.

About Trillium

Trillium Solutions Group, Inc. is a professional services firm headquartered in Chicago that provides technology consulting and strategic sourcing services for industries such as trade associations, financial services, telecommunications, and healthcare. For more information, please visit www.trilliumsg.com.