CASE STUDY

Engage Mutual Assurance

Steve Nightingale, Configuration Controller at engage Mutual Assurance, explains how AllChange *has become an integral part of the organisation's IT management process, providing a flexible, automated and integrated system that is set to transform their IT functions.*

engage Mutual Assurance (Homeowners Friendly Society, prior to February 2005), is a leading friendly society in the UK with over 250,000 members. As a mutual society, owned by members not by shareholders all profits made are put to use for the members' benefit.

On 31st October 2003 **engage** Mutual Assurance (whilst still under the banner of Homeowners Friendly Society), merged with the UK Civil Service Benefit Society.

engage is a "contemporary" Friendly Society, with a mission to help people to protect their welfare, by providing accessible, simple, value for money, savings and protection products.

The central IT department at **engage** had used change and configuration management systems prior to using AllChange. We had developed almost all of our own customer and policy administration systems, plus web sites and telebusiness scripting systems.

The organisation utilised three disparate systems to handle job tracking, software version control and software release management. The first and third of these were home-grown Oracle-based systems, with the central version control environment being Microsoft SourceSafe version 5.

The main reason for changing these systems was that the organisation's requirements simply outgrew the capacity and functionality within these Systems, in terms of volume and the sheer amount and complexity of the controlled material. In five years we had moved from the development and maintenance of one main customer administration system to five additional systems plus a number of web sites, together with a corresponding increase in the head count within IT.

It became apparent that there was need to adopt mechanisms and processes much more akin to a software house than had been previously maintained within the IT function.

The three disparate systems then in use were simply not up to the job.

The evaluation process looked at six systems, which were evaluated against a previously drawn up set of basic requirements. However, it was felt that simply comparing the ability of each against these requirements was insufficient and that a better evaluation would be to see how each performed and behaved against a series of daily and one-off typical SCM scenarios. For example, whilst all the systems allowed the renaming of a part, the action took two key presses in some and ten key presses in one!

Obviously, this kind of evaluation was much easier against those products where the suppliers were able to give us a demonstration copy. Up-front presentations have their place, but the evaluation becomes controlled by the supplier not the buyer.

Intasoft supplied an evaluation copy of AllChange*. This enabled the evaluation process against this product to be very intensive indeed.*

"In time, AllChange will form the central framework through which almost every IT action will naturally and comfortably take place."

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There were three main factors that were of particular importance to us when selecting a configuration management (CM) product.

First and foremost was flexibility. The **engage** IT Department strongly follows the adage that the supporting systems should manage the existing procedures, rather than being obliged to change the procedures to match the system. It is something of a balancing act. The IT supporting systems should uphold adherence to the agreed procedures but should not limit what those procedures can be.

Secondly was automation. A lot of SCM activity is highly mechanistic. Moving parts to the operating system, building up the next release, notifying users of change etc. In the previous disparate systems this was very manually intensive and a poor use of highly skilled team members' time. We were looking for a CM product where many of these mechanisms could be automated.

Thirdly was integration. Simply replacing one or all of the three disparate systems with new disparate systems would not have eradicated the problems of duplicate information entry, data inconsistency and fragmented audit trails. The robustness of an environment where a developer is obliged to link a software change with a tracked job and an eventual release was a key requirement.

AllChange soon emerged as the obvious choice.

AllChange **met all of our requirements, in a single, flexible, automated system.**

engage has now been using AllChange since the end of April 2004. It is used by the whole IT department, plus a fluctuating contingent of contractors. It is also used in the Communications department for version controlling web page changes and by Customer Service Projects. Furthermore, it is being rolled out to a number of other key players within the organisation who use the free 'read-only' aspect of the product to watch over the progress of fixes etc.

engage uses AllChange for the recording and job tracking of ICT fault reports on PCs, Networks, Servers, Windows/Office etc.

AllChange is also used for job tracking and software change and release control of support and maintenance fixes in the following areas:

- Direct changes to the person/policy information on the administration systems

- Small bug fixes to the application software

Current projects involving job tracking and software change and release control of project software development include:

- Large scale changes to the existing systems for the Government's new Child Trust Fund

- Completing changes to the existing systems from the migration of the UK data

- New and changed web sites

- Changes to the existing system to reflect the new trading name of **engage**

"I find AllChange an invaluable tool for tracking the status and progress of outstanding jobs, the level of detail which can be recorded is excellent, and it also allows me to check up on what the systems guys are getting up to!"

AllChange **has helped engage to improve working processes and efficiency in a number of ways.**

It has provided the working framework where the users are led towards dotting all the i's and crossing all the t's. Within the previous disparate systems it was all too easy and tempting in a rush - to bypass procedures. An action that often came back to bite us!

AllChange provides a framework that maps the project procedures, which not only keeps the CM person happy but helps the project leaders to manage their projects better.

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AllChange gives them access to immediate and completely up to date information as to the stages of the various tasks and changes going on within their project.

Previously, project releases of, for example one thousand parts, were taking a full day to prepare. Every part had to be checked individually against a manually written release request and moved to a release directory. Each part then had to be reset in the version control environment to indicate that this was the new live version.

same change request, there is no need to scour around multiple areas to pull together the necessary information.

This especially highlights the way that AllChange has helped the ICT team and the software development teams to operate in a more together fashion, with shared processes and shared information.

AllChange *has made a big difference in raising the visibility of IT and in integrating IT within* engage *as a whole.*

It has also enabled the frequent changes to the web sites to be actioned outside of IT, but still be monitored and controlled by IT defined processes. As above, not only does it give a valuable insight to the processes within IT to another department, it also takes some of the pressure off one IT person who was acting as a librarian checking these parts in/out of the previous systems on their behalf.

engage has made use of the extensive customization capabilities of AllChange, adapting the out-of-the-box functionality, adding new procedures and developing our own cycles.

Our initial configuration of AllChange was fairly complex, because it had to handle our multiple project and release processes. We are now working towards rationalising the number of processes within a simpler configuration.

This does highlight again the main advantage of AllChange*. It can be as complex or as simple as the customer wants. Furthermore, if it has been configured one way, it can be reconfigured in another when required.*

> *"The potential is apparent (within AllChange) to take the software release mechanisms to much higher levels of control than was available under the previous systems."*

With AllChange, the project release is built up and validated as the project progresses and updating the live baseline is just a small semi-automated process.

A common question is a request for a full history of a change, sometimes one that spans both ICT and application software involvement. Now that both are within the same system in AllChange, indeed under the

Thanks to AllChange, visibility of the IT function has increased, in terms of the business now being able to track what stage fixes are at, who has been assigned to them and in the ability to view the textual information as it is added. This is a positive step towards integrating IT within the business as, is often the case in many companies, IT is seen as an island to themselves.

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It's the personal touch that makes Intasoft that little bit better to deal with.

The customer has the opportunity to develop ongoing working relationships with Intasoft people, and benefit from the individual communication that brings. The people at Intasoft really do believe in their product, and this comes across in an almost tangible zeal.

Intasoft make every effort to be a 'listening' company, actively seeking the views and ideas from its customers. What is more, it actually acts on that information, which is more than a lot of other companies do who supposedly listen to their customers. It makes a customer feel that they have an active and valuable part in the evolution of the product.

This business attitude is reflected in the quality of the product and it is easy to see refinements that have been the result of a customer suggestion.

Intasoft provide fantastic technical support.

We use Intasoft's technical support service and I have to say that they have provided the best and fastest technical

support service that I have ever encountered among the many suppliers I have dealt with over the years. I like the support service in particular because of the:

Accessibility - I have got through to the support service every time first time, whether via email or telephone.

Ownership - There is no bouncing of my support enquiry between different people. The first person to respond accepts ownership of the issue and sees it through to the end.

Response - Every support enquiry has received a response, almost always within the same day.

AllChange **for the future.**

engage has exciting plans for the future. The IT Department is putting together a new team structure, which includes the formation of a new position of Configuration Controller. The remit of this position is to expand the current control of the application software to also include the database, hardware, servers, PCs, windows etc. i.e. the whole configuration. This highlights a new and progressive approach, where the role of the

CM will become much more active in a greater part of the IT functions. AllChange will become the backbone of this, enabling the modelling and control of whole configurations.

The next business-wide change stemming from the adoption of AllChange, will be the replacement of the existing paper-based fault submission process with the email-based direct creation of change

"The flexibility of AllChange means that it does what the customer wants it to do, not what software manufacturers (Intasoft) think the customer should be doing."

requests. This will be followed through with greater use of free read-only access of AllChange to enable those faults to be watched by the originators.

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