

CASE STUDY

Top 20 U.S. Bank Improves ITAM Efficiency and User Satisfaction by Streamlining Receiving + Deployment



COMPANY

Re-Source Partners

(248) 519-2180

info@re-sourcepartners.com



INDUSTRY

Finance/Banking



LOCATION

Troy, Michigan



SERVICES

IT Asset Management

Since the initial success of their partnership, the bank has increased Re-Source Partners' scope of work to other key hardware lifecycle areas: Auditing inventories and facilitating repairs.

As a further expansion, the bank is planning to shift responsibility for IT asset disposal (ITAD), another critical stage in the hardware lifecycle, to Re-Source Partners.

CHALLENGE

This fast-growing national bank wanted to expand its use of ServiceNow to include IT asset management and simultaneously upgrade its process for receiving and deploying IT equipment. At the time, hardware purchasing was managed by each of 140 U.S. locations. The lack of a coordinated, uniform process made managing the hardware lifecycle difficult, starting with getting accurate records and timely deployment of new assets. The ITAM team used multiple tools, including spreadsheets and manual updates, to track purchases and deliveries. This cumbersome and time-consuming receiving and deployment process also took

onsite field technicians away from resolving user issues and other responsibilities.

To jumpstart the big changes needed to improve its receiving and deployment, the bank pursued an IT services partner to take over the crucial first steps in its hardware lifecycle. Through an RFP process, the bank identified key capabilities for a managed services partner, including:

- ServiceNow experience
- ITAM expertise
- Best-practices approach and tools

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At a glance

CHALLENGES

- Lack of uniform process
- Time-consuming receiving & deployment process
- Field technicians could not focus on resolving user issues

OUTCOMES

- Reduced purchase orders and costs
- Improved hardware inventory accuracy
- Put in place key KPIs and best practices
- Improved visibility, analytics and reporting with a dashboard tracking custom KPIs based on real-time data
- Reduced hardware maintenance fees
- Enabled the bank to focus its onsite IT staff on client and network support

SOLUTION

The bank selected ITAM expert Re-Source Partners to modernize and manage tracking and logistics for its distributed IT assets. The companies collaborated to develop an improvement roadmap with agreed-upon service levels that focused on two primary objectives:

- Consolidate ordering, receiving, and distribution
- Implement real-time, serialized inventory tracking in the bank's ServiceNow asset database

Re-Source Partners first moved to centralize the delivery and distribution of end-user assets at a secure depot. This key step accelerated hardware availability and maximized data accuracy.

At the depot, the firm receives and stores bulk orders, applies barcodes and captures key information to the bank's ServiceNow database. It created fields to track this hardware data in ServiceNow and began using innovative asset tracking software to automatically gather the information.

For deployment, Re-Source Partners' techs configure each laptop to suit the specific employee. Using a dedicated private network connection controlled by the bank, Re-Source Partners accesses the client's CMDB and applies an image that is unique to the individual user. The technician then advances the asset into a workflow that ensures all relevant accessories and peripherals are assembled in a "kit" which is then deployed and tracked until receipt at the client site.

With the bank's three-year refresh schedule for roughly 15,000 employee laptops, Re-Source Partners is receiving and deploying about 300 new laptops a month.

OUTCOMES

The bank has achieved its goal of a centralized, streamlined receiving and deployment operation on ServiceNow. The more efficient process has:

- **Reduced purchase orders and costs**
- **Improved hardware inventory accuracy**
- **Put in place key KPIs and best practices**
- **Improved visibility, analytics and reporting with a dashboard tracking custom KPIs based on real-time data**
- **Reduced hardware maintenance fees**
- **Enabled the bank to focus its onsite IT staff on client and network support**

Since the initial success of their partnership, the bank has increased Re-Source Partners' scope of work to other key hardware lifecycle areas: Auditing inventories and facilitating repairs.

Every three years, Re-Source Partners conducts audits of more than 20,000 end-user assets, including laptops, headsets, desktops, monitors and keyboards. Re-Source Partners deploys field services teams to complete the physical inventory at more than 30 offices, verifying and reconciling assets to meet regulatory compliance and security requirements.

The firm also works with the bank's computer equipment manufacturer to facilitate repairs at its warehouse and replaces broken laptops as needed.

As a further expansion, the bank is planning to shift responsibility for IT asset disposal (ITAD), another critical stage in the hardware lifecycle, to Re-Source Partners.