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— DIANE BURKERT,
DIRECTOR OF ENTERPRISE
DESKSIDE SERVICES

CASE STUDY

Automating Service Fulfillment within the Enterprise and Beyond

In 2008, CSAA Insurance Group implemented PMG’s Service Catalog Suite to help automate IT service delivery across the enterprise. During the last four years, CSAA has consistently expanded the service catalog capabilities to more than 575 IT services while extending to more than 3,500 users. As a result, employees and agents have an improved service request experience and service levels.

CHALLENGE: BUILDING A FOUNDATION FOR A WORLD CLASS SERVICES ORGANIZATION

CSAA Insurance Group offers automobile, homeowners, and other personal lines of insurance to AAA members through partnerships with AAA clubs in 23 states. It is one of the largest personal lines insurance companies in the United States.

In early 2008, the company decided to replace its IT ticketing request system used to track and fulfill IT service requests, like ordering a new laptop or accessing software. A more flexible Information Technology Infrastructure Library (ITIL) compliant service catalog was needed as a foundation for the IT department so it could improve its response to IT service requests.

SOLUTION: A FLEXIBLE, EASY TO USE SERVICE CATALOG

CSAA began searching for an actionable service catalog designed to handle service requests and to be the foundation for larger service management initiatives. PMG was selected because of its flexibility for very rapid development of service offerings. The company then began its project and had more than a dozen services and associated business process workflows live in production within eight weeks.

COMPANY

CSAA Insurance Group

INDUSTRY

Personal Lines Insurance

WEB SITE

www.csaa-insurance.aaa.com

PROJECT

IT Service Delivery

Later in 2008, CSAA launched its service catalog with more than 100 service offerings and has continued to incorporate feedback and expand the catalog to 575 services. The service offerings range from ordering, updating and moving computers and phones to granting network and application access. Using PMG's graphical workflow engine, the company can add new services as needed and automate workflows streamlining the fulfillment process.

"PMG's service catalog is flexible and easy to use," said Diane Burkert, CSAA Insurance Group, Director of Enterprise Deskside Services. "I wanted a service catalog that's user friendly and PMG's solution fit the bill."

A goal of the company was to remove delays and improve communication during the employee onboarding process. After implementation, employee orientation became a faster, automated process using cross-departmental process workflows.

"With the PMG Service Catalog, now everyone has a single place to go to get all their service requests fulfilled in a more efficient manner," said Shadi Ziaei, CSAA Insurance Group IT Service Center Manager.

Leveraging PMG's extensive library of connectors, the CSAA service catalog integrates directly with ServiceNow for asset management and back-end fulfillment, complete with automated assignment of requests. Now the company can better operate in a service management model, complete with the ability to incorporate service level agreements (SLAs), track time, and charge for services.

RESULTS: IMPROVED SERVICE MANAGEMENT ACROSS THE ENTERPRISE AND BEYOND

With PMG's service catalog, CSAA has automated and streamlined the service management process, reducing calls and automating workflows for more than 55,000 requests per year.

CSAA continues to automate every aspect of their service management, including an automated push of software upgrades and automated hardware fulfillment via a 3rd party. By automating hardware fulfillment directly with its supplier the company has been able to speed up the process and free up more personnel.

Additionally, the company is now working on providing field agents, in all Partner clubs across 23 states, access to the PMG Service Catalog. The goal is to help reduce the workload for the CSAA Insurance Group Service Center.

ABOUT CSAA INSURANCE GROUP

CSAA Insurance Group offers automobile, homeowners and other personal lines of insurance to AAA members through partnerships with AAA clubs. It is one of the largest personal lines insurance companies in the United States and is rated A+ by A.M. Best.

Accessed by more than 3,500 users, CSAA Insurance Group's service catalog includes capabilities for:

- **Service Request Management**
 - Provide application access
 - Provision software requests
 - Get, move, reassign or retire computers or phones
- **Employee On-boarding (orientation) and Off-boarding (termination)**
- **Automated Software Push via Integration with Active Directory**
- **Automated Hardware Fulfillment by 3rd Party Vendor**
- **Automated Access Provisioning**