The Challenge: A highly recognized Global Financial Services firm purchased and implemented APM about five years ago from a prominent software organization. The software firm had been involved in several short engagements to support the implementation of APM but had not realized measurable success as the end users were struggling with the use of the toolset. The firm decided to introduce their user Adoption Partner **Eagle Consulting Partners** to design and implement an adoption solution, which included the use of Oracle's User Productivity Kit Product (UPK) to create and deploy content. When best practices had been established, the team leveraged UPK to create training and operational materials for their processes and procedures.

The engagement: The first priority was to bring key stakeholders to a single location in Dallas, Texas. Spending considerable time listening, the joint team learned of the client's application management goals, objectives, challenges and issues. The firm's primary software Architect says, "By digging down deep, we determined the root causes of the organization's pain points."

Brian Thompson (from Eagle Consulting), and the software's firm Senior Project Manager provided the organization with information about leading practices and CMM, CMMI, ISO and ITIL industry standards. The leadership didn't want just the software firm's view of the world. They wanted to mature as an organization, so we informed them about industry standards and best practices that would contribute significantly to achieving maturity."

The team leveraged its experience, expertise and utilized industry best practices to define a process enablement methodology that would scale to meet the company's requirements. Deliverables included:

- A detailed "as is" state and "to be" ideal end state
- An impact assessment, which evaluated the current state against the end state
- A modularized roadmap for success, including process and organizational changes
- Process overview information and quizzes to ensure everyone knows how to use APM and CEM, which were presented to the client as part of the solution
- Training and education recommendations, including updating UPK to reflect the new processes services mapped out

The Outcome: The team built and delivered a clear plan for success, which the firm accepted in January 2015, marking the end of the engagement. This was a pure consulting and solution adoption engagement, and for the most part, the firm is responsible for implementing the changes recommended by the joint teams.

The plan enables rapid and systematic on-boarding of applications, improved processes, procedures and guidelines. The project Manager says, "Historically, when the firm's monitoring team received a request to monitor an application, it took upwards of three months from request to monitoring. The process we identified should reduce that to three weeks."

Recognizing the varying levels of difficulty, the joint team articulated the importance of marrying strategic planning with tactical work. They also emphasized the desirability of incremental progress with checkpoints to ensure user adoption along the way.

Some changes will take six to 12 months to institutionalize, while others will be more immediate. UPK was a quick win: the content was immediately updated to reflect short-term changes and best practices, and the organization is already realizing its value. The lead Architect states, "The UPK content was updated to align to the firm's global processes, allowing quick access for process users."

Brian Thompson commented, "Feedback from the field on UPK is that the easily accessible simulations that walk through how to utilize the system to perform tasks are very helpful in getting comfortable with and adopting APM and CEM."

Brian continues, "the organization knows the product is good, and that it can do what they want it to do, but they didn't know how to get there. They needed guidance to understand how to achieve maximum advantage. That's what we armed them with." This effort lays the groundwork to help the firm establish a process improvement practice center of excellence. In addition, the methodology used for APM can be applied to other service assurance products. This type of pure services engagement goes a long way in protecting and growing our APM product footprint. It ensures that the customer is using APM to its fullest advantage and increases the stickiness of our solution.