China Merchants Bank streamlines IT management

HPE Software Professional Services standardizes IT operations and simplifies management

Objective
Improve ITSM standards

Approach
Decided to use ITIL principles then sought a partner who had proven ITIL and ITSM expertise

IT Matters
- Standardized IT operation and management procedures
- Simplified ITIL processes
- Improved IT system reliability and efficiency

Business Matters
- Enhanced ITSM standards
- Reduced operational challenges by implementing comprehensive IT control throughout the data center
- Reduced the time when the business system needs to be launched

China Merchants Bank wanted to improve its IT Service Management. With the help of HPE Software Professional Services consultants and HPE Software products, the bank has now introduced standardized ITIL procedures. This has led to greater automation, improved reliability, enhanced efficiency and lower costs.

Challenge

Need to standardize ITSM
China Merchants Bank (CMB) is China's first commercial bank with shareholders. It has created multiple firsts in the Chinese banking market, including its One Card, One Network and Golden Sunflower Wealth Management.

The bank places an emphasis on innovation and good service. These assets are inextricably linked to its ongoing technology strategy. The IT team believes it is only through pursuing the most advanced technological trends and being willing to try new IT management that it can maintain a leading position.

"If ITIL improves the quality of IT services through standardization, then an automated IT operation reduces IT management and enhances efficiency. These are indispensable qualities."

– Mr Gao, operation center manager, Data Technology Department, China Merchants Bank

CMB has a main data center in Shanghai and a secondary site in Shenzhen. The two sites operate simultaneously, increasing the availability, safety and continuity of the bank's data services. The main data center was set up so that multiple functions could be managed from one server; that technical convergence could transcend the boundaries between servers, network, software and storage space, and that the new application framework could promote the reuse of facilities. However, the complex framework, busy network distribution, repetitive inspection procedures and dispersed operations meant that system operation was taking up significant capital and human resources.

Co-ordination between different operational teams and systems lacked standardized control. Faced with multiple management tasks, the Data Technology Department needed to unify the control. IT operation standards had to be raised to ensure the stable operation of the IT systems.

System complexity motivated CMB to enter the ITSM arena as long ago as 2009. The aim was to build a unified IT management framework that would automate IT management systems, simplify maintenance, and enable comprehensive IT control for the entire data center.

When introducing new ITSM systems, Mr Gao, operation center manager of the bank's Data Technology Department took account of the standards set out in ITIL and ISO20000. However, although the bank had already been exposed to mature production management concepts, such theories had never been formally applied to the IT operation. It needed an experienced external partner to assist with implementation.

ITSM is a long-term project, which must be continuously fine-tuned, so CMB needed a partner who could provide a comprehensive ITSM plan. The partner must have experience in supporting large-scale ITIL implementations in the finance industry, including overall planning, product technology, service and project management.

Solution

External help with ITIL
China Merchants Bank favored the ITSM expertise of Hewlett Packard Enterprise, with its emphasis on overall ability. In addition to consultancy, HPE also provided CMB with a comprehensive range of automation software products including HPE Server Automation, HPE Network Automation and HPE Operations Orchestration.

After thorough analysis, the bank decided to introduce ITIL to safeguard and enhance service management standards. Automation would simplify IT systems, enhance reliability and lower costs. Since the initial ITSM implementation in 2009, China Merchants Bank's ITIL and automated IT operation projects have undergone four expansion phases.

At the start of the project, the greatest worry for CMB project managers was how to change the work habits of its IT operations staff. If the bank was to ensure it operates in line with best practices it would need to obtain analyzable metrics.

With its technical capabilities and proactive consulting service built on 20 years of experience, HPE Software Professional Services consultants completely removed those worries. By using the ITIL management system, the consultants created an IT operation and management platform backed by management systems and procedures. Through the organic combination of staff, technology and procedures, a comprehensive IT operation and management system was formed to bring about the standardization and normalization of the IT operation and management systems. HPE's complete set of industry-leading ITSM management tools helped CMB to turn its cumbersome breakdown handling regulations and operation policies into simple electronic procedures. The IT management staff did not need to memorize the various technical terms and could complete operations just by following the reminders in the electronic procedures.

CMB's ITSM construction plan is centered on achieving a three-stage goal of improving operations and management, improving service management and improving comprehensive IT control. This was implemented from scratch and continuously refined, analyzed and improved, until the ITSM system finally operated effectively within the company.

Benefit

Standardized and simplified
With the help of HPE, CMB has started to introduce ITSM into the support services and procedures that impact customers' experience the most, obtaining sufficient data to enable it to enforce efficient procedures. The bank has implemented function modules for service support such as emergencies, service requests, questions, installations, modifications and knowledge database. It has also created service delivery modules such as availability management, capacity management and distribution management. Additionally, CMB has introduced non-standardized expansion of ITIL by targeting the supervision and handling of management, regular scheduling, and addressing various flaws.

These consolidated standards and procedures have provided the basis for CMB's ITSM best practice and have turned multiple management theories into practical, operable content. Increasing automation and raising management standards have resulted in greatly improved IT services. In addition to the headquarters, ITIL has now been extended to six branches, and the bank is poised to roll out complete and detailed ITIL specifications to every branch.

Customer at a glance

Software
- HPE Service Manager
- HPE Universal CMDB
- HPE Server Automation
- HPE Network Automation
- HPE Operations Orchestration
- HPE Cloud Service Automation

HPE services
- HPE Software Professional Services
- Services Consultancy

Throughout the project, HPE's on-site technical team fully understood CMB's current IT operation and management environment and procedures. It also worked closely with management staff in the safety and network groups to quickly pinpoint problems, to ensure that the delivery of services was more targeted and that there were ongoing post-completion improvements to the project.

Data center refinements and improvements are continuing because rapid business growth has resulted in resource bottlenecks at the data center so the bank urgently needs a basic platform that can cope with large volumes of new business at high speed. To meet these needs, it has decided to introduce a Real Time Infrastructure (RTI) and HPE Cloud Service Automation is supporting that.

"In accordance with the advanced theory and practice of Gartner's RTI, China Merchants Bank is currently conducting transition and upgrade at its infrastructure level. In terms of management tools to support the RTI operation, HPE Cloud Service Automation can, through an automated service gateway and management platform that can target multiple cloud environments, enhance agility, lower costs and risks, and significantly reduce the time that the business system needs to be online," says Mr Gao.

CMB is not only improving the maturity of its own IT operation and management but is also working with HPE to draw up national certification and accreditation standards for data centers. Using CMB's IT management model as a prototype for best industry practice, the Standards for Evaluating the Maturity of Data Center Services project presents a set of maturity evaluation standards for data center services.

It is co-sponsored by the China Information Security Certification Center, CMB, HPE, GDS and Trendsetting Consulting. Through strategic development, sustained operation and 48 procedures that govern three management domains, it provides a basis for continuous management improvements and innovation for data centers.

The Standards for Evaluating the Maturity of Data Center Services have been accepted by the China National Accreditation Service for Conformity Assessment and reviewed by experts, and have become the industry standard for certification and accreditation. They will continue to be promoted and national standards will be further developed.

Through the three stages of refinement, improvement and implementation, CMB's data center has created the system of closed-loop business management, automated change and operation management, and has expanded the scope of ITSM to the whole infrastructure and automated cloud service RTI. In the future, the bank hopes to increase the maturity levels of the data center and enter into even more pragmatic cooperation opportunities with HPE in the fields of high availability development, automation and data safety. "When thinking back to our experience of the past few years, I believe that the most crucial factor was that we selected the right partner," concludes Mr Gao.

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