

## BACKGROUND

Established in 2002, Tegen is a leading provider of IT management, support, outsourced IT services and Cloud solutions to a range of business sectors across London and the South East. An ambitious, fast growing and forward thinking organisation, Tegen prides itself on developing strategic, long term and meaningful relationships with its clients, including situations where it effectively acts as their IT Department. As the Company has grown in terms of employees, so has its clients, with Tegen's typical client now employing 50+ employees.

Richard Smith, the Founder and Managing Director of Tegen, has always looked to the future in terms of investment and ensuring the infrastructure and systems are capable of supporting the Company's growth plans. As he elaborates, "Examples of our forward thinking have been the investments made in automated systems, most notably ConnectWise, a fully integrated Customer Relationship Management (CRM) system and N-able, a remote monitoring and management (RMM) system. Both of these are typically found in larger organisations, but they provide us with the foundation of a highly scalable IT service management system."



In 2013, Tegen decided to seek certification against ISO/IEC 20000:2011 (ISO 20000), the leading International Standard for IT Service Management for the whole organisation. The Standard, which was released in 2005 and updated in 2011, is based on the IT infrastructure library (ITIL®) best practice framework and is designed to allow organisations to demonstrate excellence and prove best practice in IT Service Management.

In January 2014, Tegen achieved certification and this case study examines some of the business drivers behind the decision to achieve certification, along with some of the Company's experiences including key success criteria and benefits derived.

### Business Drivers

Tegen repositioned the business in 2013, and it was this strategy that made them aware of the ISO 20000 certification. As Tegen investigated the pros and cons of certifying, Richard Smith and Richard Neal, Operations Director at Tegen, identified the following key business drivers:

- The independent validation of Tegen's Service Management System (SMS) and the processes supporting the organisation's services and products would provide reassurances to existing and prospective clients
- ISO 20000 certification would clearly differentiate Tegen from its competitors
- The Standard would provide the ideal management system infrastructure and working practices to facilitate ambitious growth plans, as well as staff retention and development.

Whilst other Standards such as ISO 27001 (Information Security) and ISO 22301 (Business Continuity) were also considered, Richard Smith explains why ISO 20000 was selected, "The Standard most closely matches exactly what we do and, as such, we and our customers would gain the most from this certification. We also believed that having such a strong foundation in place in terms of existing processes and infrastructure it would not be overly onerous."

## KEY STAGES

### Selection of Partners

#### Certification Body

British Standards Institution (BSI) was predominantly selected as the certification body (CB) as it is the most recognised body in the UK and Tegen believed its stamp on the certificate would add the greatest value. Tegen also had previous experience of BSI assessors and held them in high regard in terms of their pragmatic approach and input to the continual improvement process.

#### Consultancy Partner

Tegen recognised that in order to achieve certification, it would benefit from the assistance of a consultancy partner which could help ensure that it fully met all requirements of the Standard. Richard Smith outlines the reasons why URM was selected, “A key factor was that URM was recommended by a third party. Having shortlisted three consultancies, it was URM’s consultant who clearly demonstrated the best understanding of both the Standard and what we were trying to achieve i.e. wanting to make the Standard work for us and maximising the use of the automated CRM and RMM systems.”

### Gap Analysis

Richard Smith believes this to be the catalyst stage for the whole project in “Identifying from an ISO 20000 requirements perspective exactly what was in place and what elements were missing.” Through the gap analysis, URM identified that Tegen had all the foundations in place for effective service management, particularly with its CRM system. The main gaps identified were around the documentation of policies and processes and the limited objective evidence recorded to support the completion of an activity.

URM found the monitoring of Tegen’s customers ‘systems health’ and SLA performance to be well established activities. Although Tegen’s Management Team was intuitively identifying service improvements, there were no formal performance measurements in place to identify opportunities for improvement.

### Risk Assessment

Conducting a risk assessment is one of the core requirements of ISO 20000 and one in which URM was able to draw upon its considerable risk management expertise. Tegen’s Senior Management Team of Richard Smith, Richard

Neal and Greg Phillips (Support Desk Manager) found this stage a really useful exercise where it formally met to discuss and agree the key risks and determine appropriate remediation controls. These remediation controls included improving change management, strengthening of access and password approval processes and the implementation of information handling and protection controls e.g. the introduction of clear desk and screen policies.

### Development and Documentation of Processes and Policies

Key outputs from the gap analysis and risk assessment were the identification of those processes and the related documentation which required further development. As a result, areas which were further developed included change, task and problem management. In addition, improvements were made to the processes for introducing new products and services, as well as onboarding new staff.

Richard Neal observes “An absolutely key part of the project was to fully integrate the new processes into the existing CRM and remote management and monitoring (RMM) systems, so automating them as much as possible.” The development and programming work was split between Richard Neal, who developed and implemented the SMS framework and operational processes, whilst Greg Phillips took responsibility for developing and implementing the help desk and engineering processes.

### Staff Awareness and Training

There were actually two phases to delivering staff awareness training. Very early in the project, staff were briefed on the reasons behind Tegen certifying against ISO 20000, what was involved in the process and what benefits would be derived by both the company and them personally.

The second phase was seen by the Senior Management Team as ‘make or break’ as far as a successful implementation was concerned and this involved the launch of the new and revised Service Boards and SMS Framework where all staff were shown exactly what was required of them. As Richard Neal explains, “Without the total buy in from all staff, it was clear that the benefits of consistency and clarity would just not be realised.”

## ■ KEY SUCCESS CRITERIA

### Senior Management Commitment

In organisations of any size, the involvement and commitment of senior management is absolutely critical. As this initiative was led by the Managing Director, there were no conflicting messages or priorities and no uncertainty over the importance of the project.

### URM

URM's consultant brought a number of positive qualities and aspects to the project, most notably:

- Experience and interpretation of ISO 20000 and the ability to advise on what evidence was appropriate for the assessor
- Risk management expertise leading to the prioritisation of risks
- As Tegen took control during the implementation of controls and processes, periodic visits helped maintain the momentum of the project and ensure milestones were met
- Tegen found URM's consultant to be adept at challenging some of the existing thought processes
- Ensuring that elements of the management system were always tailored to the organisation.

### Integration with Infrastructure and Automation Tools

Undoubtedly, Tegen had an excellent foundation, with a number of strong processes and most importantly, its scalable and ideally suited automated CRM system.

### Employee Engagement

Tegen recognised that a SMS can only succeed with the total engagement and cooperation of staff delivering the services. Tegen took great care to ensure that all staff were fully briefed and trained at all stages.



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Richard Smith - Managing Director

## ■ BENEFITS SEEN

With only a small number of organisations certified to ISO 20000 in the UK, Tegen is rightly proud of fact that as an SME it has achieved the certificate. Richard Smith believes that Tegen has derived both internal and external benefits:

### Internal

In essence, Richard Smith views ISO 20000 “As a process which helps us manage the organisation’s processes. It has also allowed us to utilise ConnectWise (our automated CRM tool) to its full potential, both in terms of automating staff workflow tasks (e.g. with restructured Service Boards defined within the CRM system, we are now more able to prioritise workflows) and management system activities e.g. able to schedule quarterly training and awareness sessions, internal audits, performance monitoring and management reviews.”

As a result of satisfying the requirements of ISO 20000, life has been made easier for staff and management and it is now more straight forward and quicker to complete tasks. Richard Neal adds that “ISO 20000 has added greater clarity, consistency and resilience into processes and has reduced the possibility of anything falling between the cracks.”

Staff have fully embraced the new processes and this has led to a changed approach and mindset with them coming up with ideas for driving the continuous improvement model. Richard Smith believes that “Gaining this highly valued certificate has been a real motivator and morale booster for staff, something they can take real pride in and provides them with reassurance that they are working for a progressive growing organisation, where they are also able to develop and grow as individuals.”

### External

Richard Neal believes that “Clients have begun to see the benefits of extra consistency and clarity that the further development of processes and management has resulted in. A very practical indicator of this confidence is that they don’t feel the need to ask for the same engineers when discussing the progress of a particular task. They have greater confidence in the quality of handover notes and are happy to talk to another engineer about the resolution to a particular issue.”

In terms of business development, Richard Smith has seen the commercial benefits of ISO 20000 registration, where the certificate has provided a very tangible differentiator between Tegen and its competitors. Furthermore, the benefits are not being seen purely with existing and prospective clients, but also with potential partners. With the latter, each side is looking for reassurances that their reputation will not be damaged when recommending the other party to its client or prospect database.

Tegen continues to experience strong business growth and is currently near completion of its second strategic platform for growth implementing further plans for increased capacity, functionality enhancements and repositioning within the market place. Gaining further ISO certifications in 27001 and 9001 are components within the current plans of Tegen.

Richard Smith concludes “Embedding a service management system into Tegen, centred on ISO 20000, has pulled together and aligned all of our existing business components and processes. It has provided us with a concrete platform on which to build our business and deliver service to the highest standards. By gaining ISO 20000 certification, we can demonstrate to our customers that Tegen is indeed amongst the elite in our industry.”



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