



## To Organize and Automate IT Support, EECU Turns to Numara Software for Integrated Service Management and Desktop Management

### Background

EECU began as a member-owned financial institution serving the needs of Fort Worth (Texas) teachers. Today, with assets over \$1 billion, EECU is a community-based credit union that continues its tradition of serving educators as well as the financial needs of individuals and businesses in the greater Fort Worth and surrounding areas. The company provides more than 145,000 members with a full range of financial products and services through 13 branch locations and alternative delivery channels.

### The Challenge Help Desk with Automated Tools Required to Enhance IT Services

As EECU began researching ways to improve the IT services it provides to employees at its corporate headquarters and its 13 branch offices, CIO John Bock realized that the company needed to implement a service management solution that would help EECU automate processes and closely track how well the IT team supports end-users.

*“With 270 employees working across all of our locations, we have a lot of support incidents to address and monitor the progress of,”* Bock said. *“Previously, we did not have a formal tool to assist us. End users would place phone calls for support, and issues were generally addressed, but we did not have an effective way to measure how well IT performed.”*

Bock specifically wanted a solution to measure trends and performance, including the number of support requests, types of requests and problems users encountered, and the average resolution time.

*“This type of information allows us to identify trends and proactively prevent problems. It also gives us a baseline score to measure our performance against, so that we can work towards improving our level of service.”*

### IN BRIEF

**Company Name**  
EECU

**Industry Sector**  
Financial Services

#### The Challenge

- Deploy an effective service desk platform to provide IT services more efficiently.
- Protect computer assets by maintaining central control over software patches and the use of removable storage.

#### Why Numara Software

- The ability to add capabilities as needed, providing solutions that can expand with the business
- Integrated Service Management with Desktop Management capabilities from one central console

#### Business Benefits

- Provides statistics on IT support performance to measure resource effectiveness
- Allows for centralized management of computer asset inventory, patches and devices
- Can deploy software patches quickly to avoid risk of application degradation
- Helps ensure software license compliance by allowing license ownership to quickly be compared to license usage
- Protects sensitive data by prohibiting the use of certain removable storage devices that could potentially introduce harmful viruses
- Enhances help desk services through centralized configuration management

In searching for a service management solution, Bock not only wanted the ability to track end user requests and automate processes, but also the ability to automatically discover and manage all inventory IT assets. He was looking for a solution that could manage desktops remotely with automated patch management, software deployment, and software compliance monitoring. In addition, Bock needed a solution that could protect the network from harmful, removable media devices attached by end users.

## Numara Software Solution EECU Improves Customer Satisfaction with True Process Integrated Service Management

After considering several solutions to organize and automate IT support, EECU turned to Numara Software because of its ability to integrate Service Management and Desktop Management within a single solution.

*"The other service management options we considered were too expensive, requiring us to deploy multiple solutions to gain all the capabilities that Numara Software provides within a single solution. Not only is Numara Software's solution cost-effective, it offers the flexibility to adapt and configure solutions to meet our specific requirements, adding new capabilities as our needs change."*

Numara Software's Service Management solution brings together all of the capabilities required to successfully service customers with Incident and Problem Management, Change Management, Configuration Management, Service Catalog and Inventory and Software Deployment.

EECU began its implementation process with Incident and Problem Management. The first task was to track IT related issues that were occurring in the organization. From here, the company discovered the benefit asset inventory data would have on its service desk. Not only can the service desk agent collect issue information from the end user, now the help desk can have asset data at its fingertips. EECU then discovered and audited the hardware and software on the network.

*"Proper asset management starts with understanding what we have. Numara Software provides us with complete visibility into our entire asset inventory, and compared to manually tracking assets, we save a lot of time and avoid duplicate software license investments. Numara Software solutions automate the inventory management process and provide accurate, current and complete asset information with just a few clicks."*

The next logical step for EECU was to give its service desk agents more power to resolve incoming issues and requests. Allowing the agent to deploy software was a no-brainer. This would easily improve customer satisfaction and reduce first call resolution rate.

*"Numara Deployment Manager provides our service desk agents with comprehensive control over software application deployment. The ability to deploy software instantly without traveling to the user's desk is a huge time saver and makes our end-users very happy. We can now quickly and reliably install or remove software applications and upgrades as well as system configurations, security configurations, and operating systems all from a central console without disrupting end users. Not infringing on their work while we perform these activities is a huge plus."*

Numara's Service Management solution has helped EECU reduce wasted time passing issues to 2nd and 3rd level support staff. Enabling the service desk staff to do more has lowered the cost, risk and resource time typically required for distribution, removal and configuration changes of application software.

Two other add-on modules that EECU relies on are Numara Configuration Manager and Change Manager. Numara Configuration Manager allows the IT staff to view the relationships between the users and their PCs, as well as the relationships between their PCs and other configuration items on the network. The IT staff can easily determine the impact a change to a configuration item will have on other network resources.

*"This is much more efficient than our previous method, particularly when it comes to making changes to PCs at our branch offices. Not only were we unaware of all assets on the network, but we also were unsure of the relationship between various configuration items, specifically what software applications are on a PC. When you have a network of 300 users whom you have to manage and provide with updates, using a methodology such as our old one is simply not effective. Numara Configuration Manager is a cost-effective solution that saves us time and energy and allows us to do our job much more efficiently."*

Numara Change Manager is also helpful to EECU in that it lets IT automate change request approvals. EECU has configured its approval process workflows into Change Manager so that when a change request is submitted, it automatically follows an approval workflow. IT can also fine tune the process to ensure all the right controls are in place and to define a given set of parameters for what needs to be approved and when. With Change Manager, IT can also automatically ensure that every change follows a common set of procedures which are essential for the repeatability of the process.

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## The Results

### More Efficient Patch Management and Improved Level of Security

Numara Software's deployment and patch management capabilities help keep software and hardware systems up-to-date and configured correctly with comprehensive control over OS and application software deployments while helping prevent computer attacks by automatically providing patches.

*"Applying patches properly and keeping them current across the entire network used to be very time-consuming. We sometimes ran into patching delays that disrupted user activity, but with Numara Software, we now can deploy patches as soon as they become available."*

In addition, EECU has reduced the risk, cost and hassle of patch management by automatically identifying missing patches and delivering critical fixes to devices across the entire company.

*"We can easily and quickly manage updates and download patches. The automated process is much more reliable than our previous manual system."*

With Numara FootPrints Device Manager, EECU can prevent data leakage and privacy breaches.

*"This capability is key, because in addition to external threats, we also realize we need to be concerned with internal risks, such as those that arise from removable devices,"*

With FootPrints Device Manager, EECU can now proactively secure sensitive or proprietary data as well as the integrity of the network by enforcing policies with regards to removable media devices such as portable hard drives, USB connection devices and CD/DVD drives.

The Numara FootPrints Security and Compliance solution prevents users from bringing viruses through illegal content or unauthorized software into the EECU network.

*"It's rare that someone does something malicious. But sometimes an employee inadvertently puts us at risk by connecting a device that could do harm to the network. Numara can help identify when this happens."*

### Support for Processes Outside of IT, Including Human Resources and Facilities

In addition to providing a true IT service management solution, much of the service management functionality can accommodate processes outside the IT department. For example, the solution can help automate the processes followed by HR, Facilities, Marketing and other departments in the organization.

The ability to have separate workspaces to manage issues across the organization is extremely helpful for Bock. A solution that enables issue tracking across the organization simplifies management's job by consolidating to a single solution from a single vendor – and in the case of EECU, this vendor is Numara Software.

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### Looking Ahead

*"An important benefit going forward is the Numara Configuration Manager, which will tie everything together to a greater extent. This solution will give us a single source to manage all critical system information, and we will be able to further maximize our efficiency, ensure compliance and speed up our problem-solving capabilities."*

Continuously improving IT support is very important to EECU. Utilizing reports on volume of work performed, project status and performance trends will help Bock stay on top of customer service and support improvement.

*"As we continue to report on current staff performance, workload levels and customer satisfaction, we will have the necessary data to justify the employment of additional staff. This is important because it gives us, as the IT department, the flexibility to constantly fine tune what we do to make sure we are doing it the best way possible. So for me, Numara Software is a godsend,"* said Bock.

## Who are we?

Numara<sup>®</sup> Software Inc. is a leading provider of integrated IT management solutions for Desktop Management, PC Lifecycle Management, Security & Compliance, Help Desk and Service Desk. Designed to optimize IT management, Numara<sup>®</sup> FootPrints<sup>®</sup> and Numara<sup>®</sup> Track-It!<sup>®</sup> collectively support more than 50,000 customer sites and nearly 20 million IT assets worldwide.



freedom  
to **simply choose**  
the right solution for you