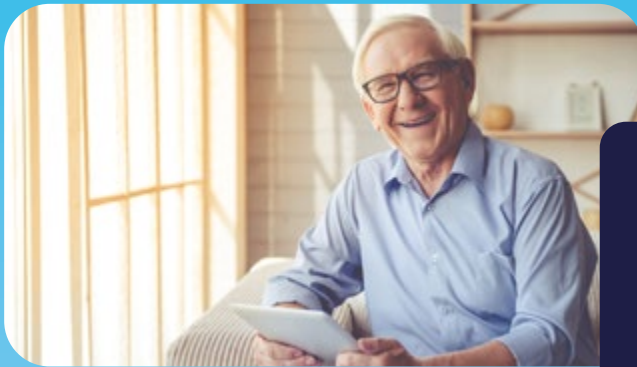


Heywood Pension Technologies

Ensuring ITIL alignment

Ensuring that pension payments are made correctly and on time to retired workers is an obligation of most private and public sector employers. Heywood Pension Technologies' leading pension administration software is therefore business-critical to ensuring customers can swiftly handle volumes of data and payments to members effectively. By implementing Sunrise IT Service Management Software, Heywood Pension Technologies has been able to adopt an ITIL process-driven approach to its customer support with a knowledge-based self-service portal and supporting the transformation of its business KPIs in order to meet changing customer needs.



“ By using Sunrise and following ITIL best practice we're able to deliver the highest level of service our customers require and therefore ensure the wider business thrives. ”





The largest pensions administration software provider in the UK and Ireland, Heywood Pension Technologies has offices in Cheshire and Surrey and employs over 200 people. It works with operators of public sector and company pension schemes, third party administrators and life and pensions providers.

Its software supports 90% of local councils, who are responsible for administering pension schemes with hundreds of thousands of members across the UK and Ireland.

Committed to outstanding support

Heywood Pension Technologies is committed to outstanding support through its service desk, working with its customers to ensure that they can successfully ensure the payment of pensions worth millions of pounds every month. As well as external customers, the service desk provides support to its company staff, including developers. This is equally business-critical - as a software house, it is vital that staff can work productively.

Support is handled by a team based across both offices. Prior to 2013 Heywood Pension Technologies relied on two legacy helpdesk systems for service management, but realised that these could not support its desire to follow ITIL best practice more closely.

“We knew we needed to change our service management approach as our previous systems were unable to provide us with the ability to differentiate incoming requests based on their importance. This meant that managing support often felt like herding cats, with a huge volume of open tickets, of varying importance,” said Steve Haslam, Head of Service Operations, Heywood Pension Technologies.

Following an extensive market review it chose Sunrise’s IT Service Management (ITSM) software, due to its in-built, comprehensive support for ITIL, ability to deliver detailed, business-focused reporting to managers and easy to use self-service portal for customers.

“Our aim is to align our working practices closely with ITIL, and Sunrise’s powerful and adaptable functionality stood out when we made our choice. It allows us to manage all our work, categorise and differentiate and get queries to the right person quickly and efficiently,” added Steve.



Migrating to a self-service portal

The service desk currently receives an average of 18,000 requests every year, 70% from external customers and 30% from internal staff. Significant spikes in activity occur, such as around HMRC end of tax year deadlines, and twice a year when the company rolls out new software to customers.

The majority of requests now come through the self-service portal, where customers can raise requests, see outstanding actions and access relevant knowledge that can help them solve problems themselves.

“ We spent a long time educating everyone about the benefits of the online portal, and they’ve now adopted it enthusiastically as they see how it gives them greater visibility and makes the whole service management process smoother and faster. ”



“With a relatively small team, we knew that we had to work smarter and help customers to help themselves,” said Steve. “We spent a long time educating everyone about the benefits of the online portal, and they’ve now adopted it enthusiastically as they see how it gives them greater visibility and makes the whole service management process smoother and faster. It is important that customers continue to receive timely responses to questions and comments added via the portal, and we monitor our responsiveness via our Incident Management procedures.”

Improved visibility

Since implementing Sunrise, the biggest transformation in service management has been around increasing granularity and differentiation of the type of incoming requests. Following ITIL guidelines it is now possible to easily differentiate between incidents (business-critical events that require instant solutions), problems (which are less urgent), service requests (which are typically resolved upon receipt by the 1st line team), and changes (which can be handled through ongoing upgrades).

This directly feeds into business service level agreements (SLAs), with internal and external customers, supporting business objectives and customer retention. Sunrise’s capabilities make management reporting flexible and straightforward, embedding service management further within the organisation.

Moving forward, Sunrise ITSM is enabling service management to become more proactive, helping Heywood Pension Technologies to differentiate itself in the market. As the pensions industry changes, driven by the increasing use of digital channels and a more knowledgeable and demanding population, the company is transforming its SLAs, changing KPIs to better support its customers, particularly in cases where it hosts their solutions.

“Digital adoption has dramatically changed how the pensions world operates,” said Steve. “In the past, members who had queries wrote to their fund administrator or provider and were happy to wait months for a response. That’s changed – many of our customers are global organisations, and their employees and ex-employees expect to be able to log on to a website whatever their time zone is and get the information they need instantly.



This means our customers today have very different needs. By using Sunrise ITSM and following ITIL best practice we’re able to deliver the service they require and therefore ensure the wider business thrives.”

Embedding service management further in the business, Heywood Pension Technologies now uses Sunrise in order to log over a thousand change management requests per year and to raise specific incidents with developers. All customer facing queries, such as to its hosted infrastructure or bespoke product functionality are tracked and managed using Sunrise.

“Working with the Sunrise team is really straightforward – they understand what we want and are always happy to provide advice and support,” concluded Steve. “In our world, failing to solve a customer issue could mean tens or even hundreds of thousands of people not receiving their pension – which would be catastrophic for everyone involved. Thanks to Sunrise and ITIL we’re confident that we can better understand and respond to changing customer needs.”

About Us

Sunrise Software has over 20 years' experience building and implementing service management software that enables organisations to support both employees and external customers. Sunrise is designed to meet industry best practice and is easily configurable to meet individual organisations' specific needs. The platform is browser based, notably easy and intuitive to use.

Sunrise ITSM is suitable for IT departments providing technical and support services, while applications are available for Shared Services and external / third party Customer Service, as well as HR/ Payroll and Facilities Management. The software is available as a Software as a Service (SaaS) solution on the IBM Cloud platform, or on-premise, and is used and trusted by hundreds of high profile organisations in public sector and commerce.



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