

Baillie Gifford's tech team stays cool with ICEflo

A new software as a service (SaaS) solution from Melrose-based Agenor Technology has enhanced the IT implementation management process at leading investment management firm, Baillie Gifford. Hi-Tech Scotland finds out more...



Colin Lennox, Technical Services Manager at Baillie Gifford.

led to Baillie Gifford becoming one of Agenor's first commercial clients for ICEflo...

Change is a risky business

Richard McGrail, Head of Information Systems at Baillie Gifford, told Hi-Tech Scotland: "As the company has grown, our extensive use of IT systems has evolved to the degree that the business is highly dependent on the availability of these services. As a result, any outage of or disruption to our IT systems could potentially have a major impact on our business operations."

McGrail explained that the IS team has to demonstrate appropriate levels of risk assessment when approaching significant infrastructure and application changes. Flexibility and agility remain core principles for the IT department, balanced with a mature and rigorous process for planning and implementing change.

"As an IT department we have great confidence in the skill and professionalism of our people, but we felt that our change processes and the associated software tools could be further improved to reflect the ever increasing demands of managing risk while implementing change. The Management of the firm naturally require assurance that all operational risks are being effectively managed by the IT department. Increasingly auditors, both internal and external, are becoming more rigorous in assessing our technology change and risk management processes – and drilling down to our implementation capabilities"

After explaining the purpose and benefits of the solution during one of the 12-minute "pitches", Andy was delighted when Richard expressed an interest in participating in the Private Beta phase of the launch. This triggered a process which subsequently

Agenor and ICEflo

Smith told Hi-Tech Scotland: "Organisations of every size are compelled to apply change to their IT business systems and the first

priority is to limit the impact this change has across the business. In a context where protection of service availability is paramount, combined with ever-reducing maintenance windows, successfully delivering time-constrained implementations represents a major challenge.

"With Agenor's programme and project management background, our consultants have managed countless implementations of IT business systems that were absolutely critical to the organisation. After many months of project delivery work, the perceived success of the project would always boil down to the successful implementation activity. In all the organisations that we've worked in, across several business sectors, the best software tool on offer to manage this time-constrained, high-pressure scenario has been a company standard spreadsheet. As those who've been in the "hot-seat" will recognise, a clever spreadsheet falls a long way short of meeting the actual information needs of the many parties involved during this critical period."

Agenor has responded to this challenge and invested over the past 3 years to create an innovative SaaS solution that meets the identified gap in the market. "ICEflo has been designed specifically to meet this implementation challenge head-on; to provide a powerful and robust platform for the management of time-constrained change by enabling thorough planning and delivering precise control during the event itself."

Andy Smith said: "Developed by practitioners, for practitioners, ICEflo delivers a unique solution with a broad range of functionality that increases control and minimises risk whenever and wherever time-constrained change occurs."

Storage Virtualisation Project (LSI SVM5 upgrade)

A significant part of Baillie Gifford's 2009 IT infrastructure investment plan was an upgrade of their virtualised Storage Area Network (SAN). Colin Lennox, Technical Services Manager at Baillie Gifford and whose team were responsible for the Storage Virtualisation project said, "This represented a challenging infrastructure upgrade project, as the SAN provides a secure and resilient platform upon which all of our key systems and the IT disaster recovery solution depend. We adopted a very prudent approach to the implementation as we recognised that risk mitigation would be essential.

As an LSI Storage partner, Sun Microsystems kindly allowed us to use their extensive test facilities at their site in Linlithgow. Our test and validation processes were complex, extending to a period of four weeks. During this period our processes were recorded in ICEflo, allowing us to track progress and ultimately produce a detailed and accurate plan for the live implementation."

Lennox continued: "It was critical to me that my team recognised the reasons for and the benefits of ICEflo and that they didn't feel that ICEflo was yet another management tool for solely bureaucratic purposes. The

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demo, training and early usage all combined to enable us to build that level of confidence and acceptance



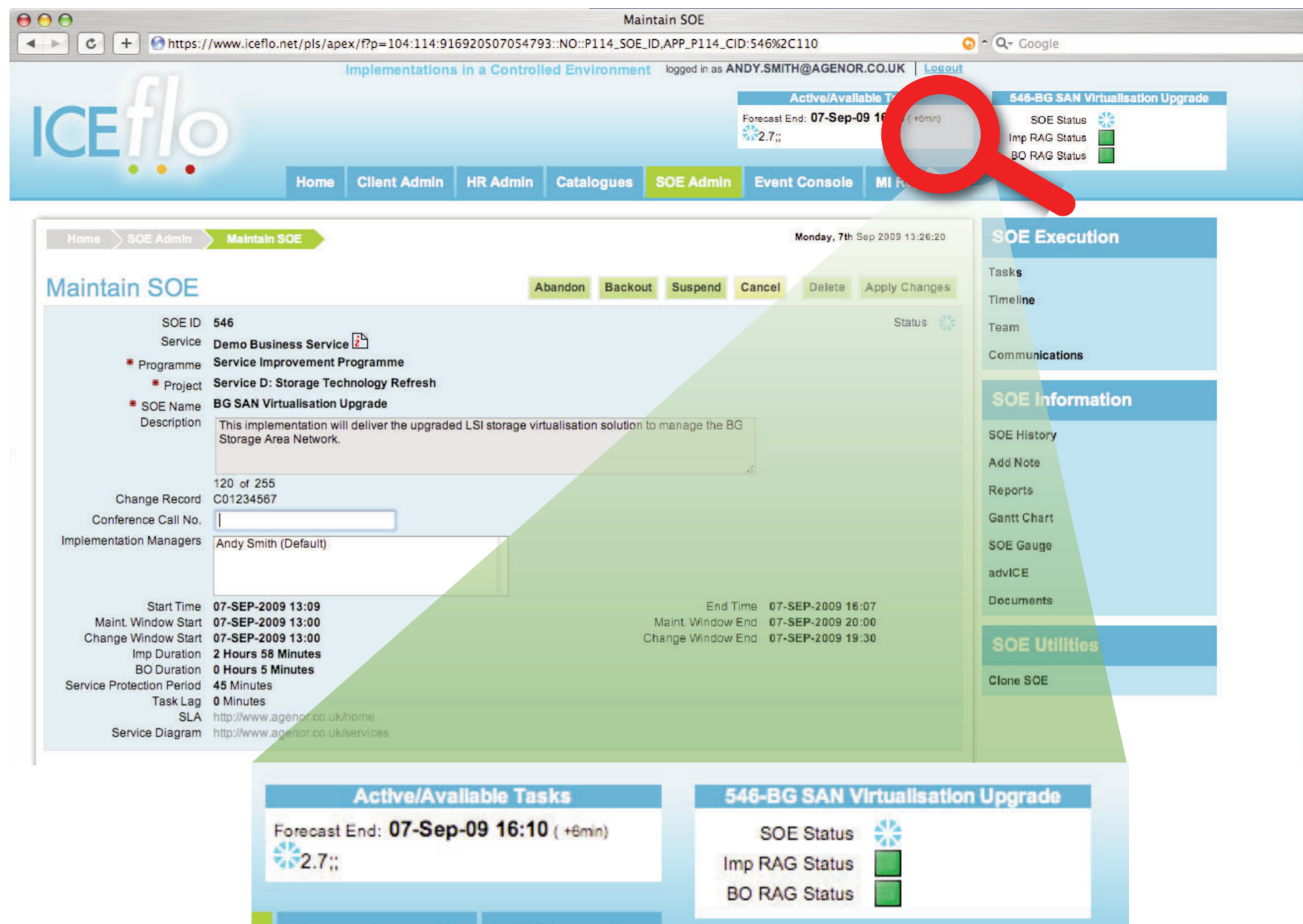
Andy Smith, Founder and Managing Director of Agenor Technology.

within my team"

Encouragingly, the technical staff embraced ICEflo as both a software product that they could easily use and as a solution that supported and encouraged more robust planning and implementation processes.

"During the early months, our team identified a number of areas where the ICEflo solution could be enhanced and we were delighted that Agenor responded so positively and quickly to our requests" said Lennox. "We invited Andy in to help with the initial implementation planning of the Storage Virtualisation and he quickly established his credibility with the infrastructure team. Having worked with ICEflo for several months during the early adoption phase, everyone involved agreed that the Storage

Virtualisation was a perfect candidate for full-scale use of the ICEflo solution."



The Baillie Gifford SAN Virtualisation Project

- Build a replica of the current BG infrastructure, including servers, network and SAN solution at Sun Microsystems Technology Centre in Linlithgow
- Build the technical implementation for the upgrade and the associated backout plan using ICEflo
- Perform the upgrade of the Linlithgow replica, refining the plan as issues were encountered
- Repeat this cycle of rehearsals until the ICEflo implementation plan was completely proven
- Rehearse the backout plan to conclude the exercise

Colin Lennox polled his team after the Storage Virtualisation, asking his team to add to his views on the benefits of ICEflo. Here's what the team said:

- Provides a standard process for the creation of detailed implementation plans

- Provides a standard solution for the various teams to compile and refine an overall plan
- Provides a common "vocabulary" when discussing a technical implementation plan
- Automatically constructs and continuously updates the overall event timeline, including backout
- Allows creation of templates, supporting re-use for similar jobs in future
- Provides a strong communication platform including email and SMS to those not directly involved
- Allows management to remotely view progress against the plan with a clear indication of overall status.

Colin added his own recommendation, saying "ICEflo is a cost-effective solution that addresses the challenge of implementing complex technical change. It provides a powerful set of features in this pressurised, high-impact environment, increasing control and reducing risk."

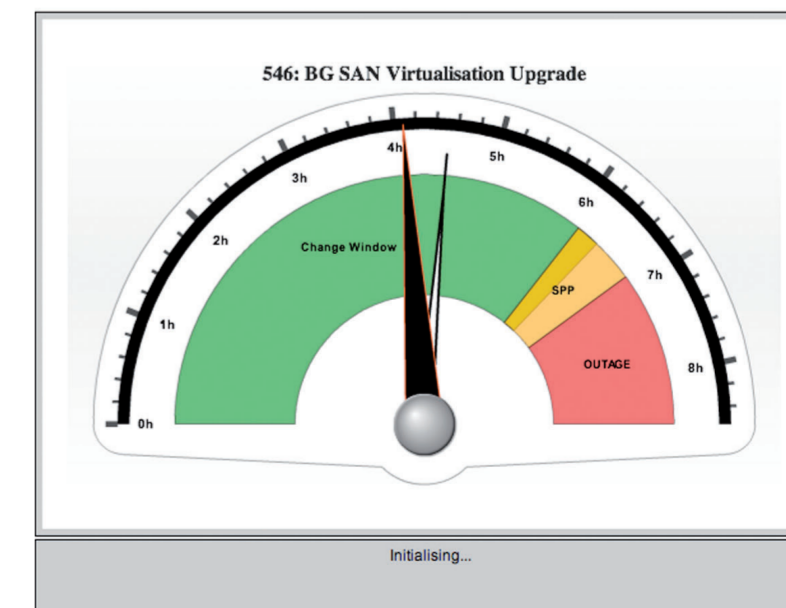
The Future

Baillie Gifford is committed to using ICEflo for a growing proportion

of their key infrastructure and application changes.

Colin Lennox said "We plan to extend the use of ICEflo to a broad range of change scenarios, rolling out the solution to several more teams in our IT department. We won't use ICEflo for every change but we'll embed ICEflo in our standards and processes to the extent that when

high risk and technical complexity meet, ICEflo will almost certainly be involved. In addition to planned maintenance activities, we will actively consider ICEflo in our regular Business Continuity rehearsals. We've already seen the product evolve in response to specific feedback that we've provided and we look forward to influencing the product roadmap in



the future" Andy Smith of Agenor thanked Richard McGrail and his team, saying: "Baillie Gifford has been a perfect partner for the early adoption phase of ICEflo's commercialisation journey. We've built on our past relationship and both teams have worked exceptionally well together to achieve a "win-win" outcome with the success of the Storage Virtualisation project. At Agenor, we really appreciate the support and commitment that Richard, Colin and all the team at Baillie Gifford have provided to a startup company and we look forward to working with Baillie Gifford in the years ahead."

Smith added: "And I'd like to also say 'thanks' to Scottish Enterprise and AEGON UK respectively for arranging and hosting the SE Connections event last year. After all, that's where the story began!"

» <http://www.bailliegifford.com>

» <http://www.iceflo.com>