



## NATIXIS Global Asset Management

### NATIXIS GLOBAL ASSET MANAGEMENT AUTOMATES BUSINESS SERVICES WITH HEAT SERVICE MANAGEMENT

#### COMPANY

**Name:** Natixis Global Asset Management  
**Location:** Boston, MA  
**Industry:** Financial Services  
**Website:** www.ngam.natixis.com

#### SOLUTION

HEAT Service Management

#### BUSINESS BENEFITS

- Automate business processes for IT, human resources, and finance departments
- Nearly half of request fulfillment tickets submitted via self-service
- Enforce and streamline change management processes

“We use HEAT Self Service for all our employee provisioning needs, including setting up new employees and terminations.”

Marina Shereshevskaya  
Manager of IT Governance at Natixis Global Asset Management



#### Summary

Natixis Global Asset Management (NGAM) is one of the 15 largest asset management companies in the world, with more than 20 investment affiliates in the U.S., Europe and Asia. The firm takes a highly consultative approach to create investment solutions for institutions, intermediaries, and individuals. The company is headquartered in Paris and Boston, and has offices in Tokyo, London, and San Francisco.

Helping clients make the most of today's complex, fast-moving markets requires an agile IT infrastructure that adapts rapidly to changing business needs. To support that objective, Natixis Global Asset Management uses FrontRange HEAT Service Management to support functional and business workflow for its IT, human resources, and finance departments.

#### Accelerating IT Service Delivery

Natixis Global Asset Management, a user of FrontRange HEAT Classic since 2008, migrated to HEAT Service Management. In addition to handling requests, incidents, and changes through HEAT, Natixis Global Asset Management also uses the self-service and knowledge modules.

Marina Shereshevskaya, manager of IT governance at Natixis Global Asset Management, is pleased with the move to the latest version of HEAT Service Management and particularly appreciates the new navigation. “I really like the ability to have multiple windows open and use tabs to support our workflow,” she says. “It’s much easier to multitask now.”

About 70 employees in different departments use HEAT Service Management. The IT team uses HEAT Service Management for service desk and change management. “The requests could be anything from building a server to refreshing a database for internal development,” says Shereshevskaya.

HEAT Service Management also supports workflow for the human resources and finance departments. “We use HEAT Self Service for all our employee provisioning needs, including setting up new employees and terminations,” says Shereshevskaya. “We moved away from a human resources system that was partially integrated with HEAT Service Management. It’s a huge help that we can now store everything in one database and users don’t have to move from one application to another to get their jobs done.”

HEAT Self Service has been a welcome addition. When users need to request new services, submit an incident, or review the status of a ticket, they can call or email the service desk or help themselves via a self-service portal. The convenience of self-service has been very popular. The service desk receives almost 50 percent of request fulfillment tickets through the self-service portal, and email and phone requests have dropped sharply.

Configuring the self-service forms and automating the business workflow to meet the company's specific needs was straightforward, and it didn't require heavy lifting from developers. Shereshevskaya created forms using HEAT Service Management's intuitive graphical interface. Common business and IT workflows were automated using HEAT Service Management's business process automation capabilities. Shereshevskaya has plans to add more workflows in the future, such as ensuring that new employees receive financial and regulatory compliance training.

### Delivering Service Efficiently

Natixis Global Asset Management uses HEAT Service Management to manage service requests, plan for appropriate remediation measures, approve and authorize requests, implement changes, and audit the successful completion of the change to ensure service quality.

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Marina Shereshevskaya  
Manager of IT Governance, Natixis Global Asset Management

HEAT Service Management supports Natixis Global Asset Management's rigorous change management processes. When a change is proposed, a functional manager evaluates and approves or rejects the change, often using the self-service capability. An emergency change or a change with a major business impact must be approved by a change advisory board. Approved changes are then scheduled via HEAT, and then implemented. All administrative changes are tracked by HEAT, minimizing risk.

Shereshevskaya has built more than 20 templates for common changes to speed up the process. “The process for changes that are built from a HEAT template is streamlined,” says Shereshevskaya. “There's no need for an additional level of approval.”

“As the change manager, I love the way I can create templates in HEAT for changes,” she says. “Using the HEAT templates saves us a lot of time and my involvement in changes is much lower. The templates not only save resources, but also they ensure that people follow the same procedure every time.”

The ability to review changes after implementation in HEAT Service Management has helped with continuous process improvement. “For the post-implementation review status, it's easier to see what we have and to make decisions based on previous implementations, she says.

### An Easy Migration and Continued Improvements

Natixis Global Asset Management worked with FrontRange Professional Services on the multi-phased migration to HEAT Service Management. “There were a lot of moving parts,” says Shereshevskaya. “But we had a very successful outcome.”

As next steps, the IT governance team plans to expand the use of HEAT Service Management's dashboards and reporting. IT has also begun to explore the Knowledge Management module to further improve service efficiency.

### About Natixis Global Asset Management

Natixis Global Asset Management (NGAM) is a multi-affiliate organization that offers a single point of access to more than 20 specialized investment firms in the U.S., Europe and Asia. With \$867.2 billion AUM, the firm ranks among the world's 15 largest asset managers. NGAM is known industry-leading ideas on asset allocation and risk management. Through its Durable Portfolio Construction® philosophy, NGAM helps institutions, advisors and individuals address a range of modern market challenges. The firm's diverse offerings mean it is not beholden to a single house view and can work with clients on a consultative basis to deliver highly personalized investment solutions.

<sup>1</sup> Net asset value as of December 31, 2013. Assets under management (AUM) may include assets for which non-regulatory AUM services are provided. Non-regulatory AUM includes assets which do not fall within the SEC's definition of 'regulatory AUM' in Form ADV, Part 1.

<sup>2</sup> Cerulli Quantitative Update: Global Markets 2013 ranked Natixis Global Asset Management, S.A. as the 15th largest asset manager in the world based on assets under management as of December 31, 2012.

### More Information

#### Corporate Headquarters

FrontRange, 490 N. McCarthy Blvd, Milpitas, CA 95035 USA

T: 800.776.7889 and 1.408.601.2800 W: [www.frontrange.com](http://www.frontrange.com)