



## Enabling ITSM Transformation Through Pulse at a Global Financial Services Firm

How Brillio partnered with a leading financial institution to co-create a future-ready ITSM vision, roadmap, and operating model







A globally recognized financial services institution, the client operates in nearly every major economic center and employs over 8,000 personnel, including partner staff. As a large, complex enterprise with a significant global footprint, the organization faced mounting internal pressures across its IT landscape, including fragmented processes, tool sprawl, inconsistent governance, and a lack of visibility into service management performance.

To address these systemic challenges, the client partnered with Brillio to lead a strategic transformation initiative grounded in our proprietary Pulse methodology. The objective was to diagnose the current state rapidly, align stakeholders on a future-state vision, and design a roadmap for transformation spanning three years.

# A Fragmented ITSM Landscape with Competing Priorities

At the time of engagement, the client's ITSM capabilities were underdeveloped and distributed across siloed teams, systems, and processes. There was no centralized blueprint or cohesive strategy, leading to reactive investments that failed to resolve root causes. Foundational ITSM data was often incomplete or inconsistent, undermining the effectiveness of audit efforts, automation initiatives, and data-driven decision-making. Critical workflows varied widely across regions, with limited documentation or alignment, making them difficult to integrate or scale.

The organization's structure further complicated transformation efforts. Knowledge sharing was ad hoc, many processes were duplicated, and the absence of centralized ownership hindered accountability. A cultural mindset of "Build over Buy" and "Tool over Process" also prevailed, discouraging adoption of best practices and creating resistance to standardized approaches.

Although ServiceNow was the global ITSM toolset, its implementation lacked cohesion. Multiple home-grown tools and custom-built apps were used across the ecosystem, with no standard architecture in place. Tool performance was poor, and observability solutions were siloed, generating over a billion events per year with no unified view. Impact assessments were manual, time-consuming, and often unreliable due to disconnected CMDB relationships.

The client sought to achieve improvements across several key dimensions - including tool rationalization, increased operational efficiency, waste reduction, audit and compliance readiness, and automation enablement - while also aiming to reduce risk and technical debt. Brillio's goal was not only to address these immediate needs but also to assess the organization's readiness for change and ensure alignment between business ambition and delivery capabilities.

Diagnosing the structural and cultural barriers to modernization.

# A Pulse-Driven Approach to Unlock Clarity and Change

To address the fragmented state of ITSM, Brillio deployed its proprietary Pulse methodology, a structured, high-velocity framework designed to generate deep insight into the client's operational reality and co-create a pragmatic, strategic path forward.

Pulse is built on three foundational pillars: first, understanding the Current Mode of Operation through in-depth interviews and discovery workshops; second, designing the Future Mode of Operation by applying Brillio's intellectual property and transformation playbooks; and third, crafting Pathways that provide a step-by-step guide to move the organization toward its envisioned state.

Over just 12 weeks, Brillio mobilized a cross-functional team of ITSM, tooling, and reporting experts under the leadership of a dedicated Practice Director and Project Manager. This team conducted more than 70 stakeholder interviews, capturing over 4,500 points of input, logging 1,384 issues, and identifying 446 unique requirements. This high degree of collaboration and transparency was maintained through daily stand-ups and structured weekly engagements, ensuring continuous alignment across business and technical stakeholders. Formal checkpoints provided opportunities to validate findings, drive consensus, and iteratively refine the engagement output.

Brillio's rapid methodology for deep insight and stakeholder alignment.

# Creating a Scalable, Future-Ready ITSM Blueprint

With a clear picture of the current state in hand, Brillio transitioned to designing the Future Mode of Operation, guided by an iterative, collaborative approach. All client stakeholders were involved throughout the design process to ensure strong buy-in and traceability from the challenges captured in the CMO to the resolutions embedded in the FMO. The result was a comprehensive A0 blueprint - a visual articulation of principles, processes, and platform architecture - which mapped out the future-state design and its rationale.

At the heart of the FMO was a unified ServiceNow platform, purpose-built to integrate data, processes, tooling, governance, and roles into a cohesive, user-centric framework. This single platform enabled intentional, value-driven investment decisions and laid the groundwork for process optimization, automation, and AI augmentation of low-value, manual work.

A key feature of the design was the centralized governance model, allowing the firm to coordinate and prioritize transformation efforts in a federated environment. To support behavior and culture change, Brillio embedded its 5Es Organizational Change Management framework - Envision, Engage, Educate, Enable, Empower - ensuring transformation was people-led, not just technology-driven.

Additionally, the design allowed for core consistency while remaining flexible enough to accommodate local business needs. This balance would enable the client to scale efficiently, reduce future acquisition friction, improve compliance, and elevate both employee engagement and service quality.

Designing a unified vision to align people, processes, and platforms.



# Translating Strategy Into an Actionable Transformation Roadmap

Once the FMO was defined, a comprehensive, cost-effective roadmap was developed to guide implementation. The roadmap not only structured the execution of eight key strategic initiatives and five foundational activities but also served as the backbone of a compelling business case to help the client secure transformation funding.

At a high level, the roadmap focused on standing up a centralized program office to manage planning, communications, and delivery governance. Simultaneously, it prioritized rapid mobilization of foundational elements - including organization structure, governance, data models, process architecture, and tooling strategy - to lay the groundwork for long-term progress.

The roadmap also emphasized acceleration through early value realization. Quick wins were identified in core service areas such as Incident, Problem, Change, and Request management, enabling teams to experience tangible improvements early in the journey. To support accountability and sustainability, Brillio helped define federated roles with precise governance alignment, ensuring key ITSM outcomes would remain owned and managed beyond the life of the program.

Crucially, the roadmap was designed for phased implementation - targeting the rollout of foundational elements within the first 12 months, with full realization of the FMO expected over a three-year horizon.

Guiding execution through phased initiatives and quick wins.

## Driving Measurable Value Across the Business

The impact of Brillio's engagement extended well beyond strategy and planning - it translated into significant, measurable outcomes for the client. The business case forecasted an estimated \$70 million in asset cost savings, primarily through tool rationalization and optimized investment. Process improvements and automation were projected to eliminate 500,000 manual tickets per year, reducing operational burden while simultaneously improving service reliability.

This automation effort alone was estimated to save more than 500,000 person-hours annually, equating to roughly \$10 million in operational cost savings. In parallel, the introduction of robust compliance and governance mechanisms drove a reduction in regulatory risk, while service modernization initiatives elevated both the employee experience and customer satisfaction.

What the client has achieved and what comes next.



## ABOUT BRILLIO

**Brillio is a digital technology services company that drives AI-first engineering and design-led experiences for global enterprises.** Born digital in 2014, its consulting-led services span Customer Experience, Data & AI, Product Engineering, and Digital Infrastructure. With an industry-leading NPS of 71, Brillio accelerates time to market through its proprietary BrillioOne.ai platform, powered by AI-ready talent with deep domain expertise.

Brillio is the official Digital Transformation Partner and the official Data and AI Services Provider of Atlassian Williams Racing. Brillio partners with leading technology providers including Microsoft, AWS, Google Cloud, Salesforce, Adobe, Databricks, and Snowflake and operates with 6,000+ “Brillians” across 15 global delivery centers. Consistently recognized as a Great Place to Work® since 2021, Brillio blends innovation, talent, and purpose to deliver measurable outcomes for clients and fulfilling careers for employees.



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