



CASE STUDY

Fondaction

› TRANSFORMING IT OPERATIONS FOR SUSTAINABLE GROWTH



INTRODUCTION

Fondaction is a pioneer in sustainable finance, bringing together individuals, investors and companies committed to the positive transformation of society.

Since its creation in 1996, Fondaction has been dedicated to making Québec's economy more equitable, inclusive, green and successful. As a labour-sponsored fund, it represents tens of thousands of savers and hundreds of companies, managing a total of \$3.77 billion in net assets.

Fondaction prioritizes investments that generate positive economic, social, and environmental impacts, in addition to financial returns. It helps create and maintain quality jobs, reduce inequalities, and fight climate change while protecting our biodiversity.

With a plan to grow its assets under management and – in turn – double its number of staff, the organization needed to implement a comprehensive digital transformation programme. However, this would require significant improvements to its IT operations and would ultimately involve adopting the ITIL 4 service management framework.

CHALLENGES

A lack of efficiency in Fondaction's IT operations – identified around the start of the latest decade – led to the creation of a 2025 Masterplan.

Within this, IT formed a major part which went beyond improvements to operations but also transforming IT to support digitalization of the organization. This would involve adding more digital projects to the company portfolio, such as a customer relationship management system for sales, plus other digital solutions for the business. Hence, IT is becoming more of a business partner, not only a support department.

For this to be feasible, the IT department's priority was to stabilize its operations. At the time, the lack of stability had led to many recurring incidents and problems, along with poor incident management, absence of documentation and lack of root cause analysis.

The result was a greater level of risk for the company while wanting to implement the level of change needed to transform and grow the business. Therefore, there was a lower volume of necessary system changes and increasing technical debt. In addition, no calendar for changes existed at that point, which created conflicts between different proposed changes and didn't reflect the team's capacity.

Company management complained that IT had become a roadblock to business growth.

GOVERNANCE ISSUES IN A GROWING ORGANIZATION

The increasing workload to support Fondaction's digital transformation was hampered by a lack of clear roles and responsibilities for teams across cloud, operations, telecom and security operations. This pointed to the need for a restructuring of teams plus greater governance and defined processes to position IT as a business enabler and to support business scale up.

A critical element in this scaling up was a plan to double employee numbers and assets under management. However, basic IT processes were insufficient to onboard this quantity of new employees; a lack of clarity about change requests and knowledge sharing added significantly to the IT workload and added to the difficulty of onboarding people quickly enough. Time periods in the service level agreements for onboarding were too long and needed revising.

Other governance-related issues included uncontrolled expenses for different tools that IT had acquired without checking for duplication elsewhere in the business. The tendency had been to fund new technology solutions without having the service management maturity and structure to assess the need, cost and management of the solution.



SOLUTIONS

Within Fondaction's 2025 Masterplan was an initiative to increase maturity, skills and service quality in IT operations. The so-called "Optimum" project was about introducing ITIL 4 practices and creating ITIL practice communities. This became a pillar of fulfilling digital transformation – ensuring a safe and efficient infrastructure for secure operations and improved customer experience – that would support Fondaction's overall 2025 objectives.

The project to introduce ITIL 4 practices was designed to progress practice by practice; achieving quick wins but also installing ITIL basics and a common language across incident, problem, change and service requests, for example.

" For the first three years we focused on stabilizing the operations. Now, with more autonomous practice managers, I can focus on proactive practices like problem management – not just fighting fires but creating value and improving the experience of users asking for IT support. "

Pierre-Romain Destruy – ITSM Advisor

CREATING A NEW TRAINING AND LEARNING CULTURE

When commencing with the Optimum project, the bulk of employees had been working within the IT department for 10 years-plus. Although they were experienced workers, they hadn't undertaken regular training and were consequently running operations in the same way as five to ten years previously.

In the context of digital transformation – such as IT migrating to cloud services and implementing new tools that required expanded knowledge and training – it was necessary to incentivize people to develop their skills and go beyond what was on their job description.

Those leading the change and expansion of IT operations saw ITIL as the ideal framework to equip the existing team with the right skills to become practice managers. These skills included ITIL concepts such as co-creation of value and adding governance to change activities.

At the leadership level, David Lareau – IT operations director and Pierre-Romain Destruy – ITSM Advisor both achieved the ITIL 4 Master designation. Having ITIL 4 Master-level expertise in-house meant the company could become less dependent on external consultants for improvement initiatives and therefore strengthen its operational excellence in IT.

IMPLEMENTING ITIL 4 PRACTICES AND PRACTICE COMMUNITIES

The principal ITIL practices that Fondaction has implemented to date include incident management, service configuration management, change enablement, knowledge management and problem management.

Some **significant actions arising from ITIL practices** have included:

automating configuration management database updates to increase the reliability of information about incidents or assets

changing the relationship to IT assets via IT asset management: adding the date of computer purchases to help manage replacement

change enablement practice is improving the stability of operations at a time when the requests for change are increasing significantly.

For all practices, there are dedicated meetings and maturity evaluations to identify improvement opportunities. This includes guidance for practice managers on the possible next steps for improvement and where to allocate their time and energy.

Discussions are focused on the continual improvement of the practice, the department and how to solve daily issues. For example, in incident management, the teams now use formal communication to confirm that a user's incident is being handled, along with SLAs for the incident, including resolution time. Although a simple change, this is adding to user satisfaction.

" Certifying most of our team was a turning point. In meetings, people commonly use ITIL-backed arguments, demonstrating that we've reached a new level of understanding that will streamline our exchanges and take us further. "

David Lareau – IT Operations Director

RESULTS

Key results Fondaction IT has achieved by implementing ITIL practices include:

› INCREASED STABILITY OF OPERATIONS AND IT AVAILABILITY

Percentage of requests fulfilled, and incidents resolved according to the service level agreement:

Number of tickets /year	Incidents	Service Requests	SLA Achievement
2021	1574	2631	71.2%
2022	1884	3070	91.2%
2023	2513	3000	87.7%

In 2021, Fondaction started to measure its service levels and properly train resources on service management. The tickets used to stay open even after resolution, causing unexpected resolution times.

From 2022, Fondaction started to measure its service levels more accurately and closely monitor the ticket processing behaviours which lead to human bias (via the Hawthorne effect, by which people change their behaviour when observed) and created the “watermelon effect” of unrealistically good metrics.

From 2023, the company started to measure accurately its resolution times, considering the suspension times of ticket treatment. Furthermore, strict measurement has allowed Fondaction to realize that its goals were too low and agreements too permissive. So, the drop from 91.2 to 87.7 is explained by more aggressive ticket resolution objectives to provide a better service to the users.

› PRACTICE IMPROVEMENTS: CHANGE ENABLEMENT

2020

435 successfully-completed changes-
no visibility on failed changes.

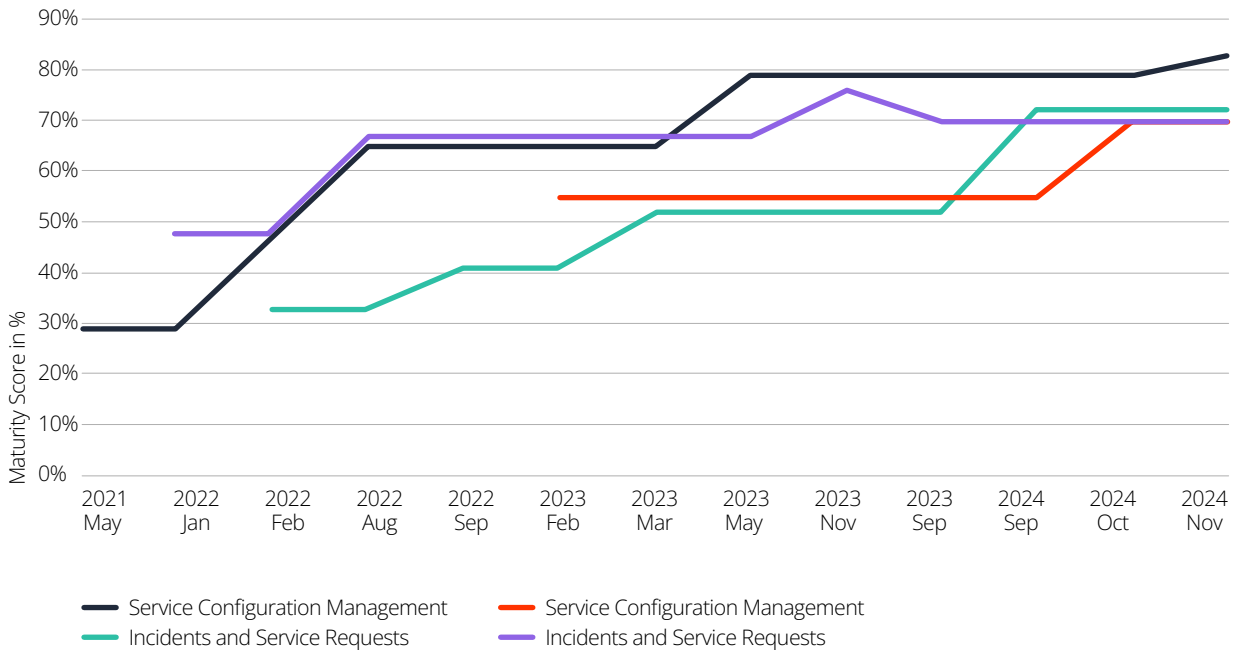
2023

465 successfully completed changes
10 partially completed changes
5 failed changes and one unauthorized change



› MATURITY ASSESSMENT (SELF-EVALUATION)

Practice maturity score evolution



Fondaction used a self-evaluation method based on COBIT controls criteria, through individual interviews with the practice managers, like individual evaluations.

For example, one of the criteria used to assess IT Change Enablement maturity is “**BAI08.03 – Use and Share Knowledge:** This process involves disseminating available knowledge resources to relevant stakeholders and communicating how these resources can be used to meet different needs. During every interview, each criteria was rated from 0 (low maturity process) to 3 (high maturity process) and all the numbers combined to calculate a maturity score percentage.

› CUSTOMER SATISFACTION INCREASE

Fondaction IT has now created a more extensive survey, asking specific points about service offerings, training and technician helpfulness, allowing the team to act on any issues and find out what needs to improve.

Service request satisfaction has increased **from an average of 4.85 to 4.95 (out of 5)**, with **survey participation increasing from 15% to 30%**.

Originally, the satisfaction rate of 4.85/5 with a low participation rate was not relevant to perform continuous improvement. So, Fondaction enriched this metric by increasing the participation rate through notifications and reminders sent to the users and added more questions to the survey, for example the user’s perception of the technician’s individual performance. This has provided great leverage to target specific improvement opportunities in service delivery and identify training needs for technicians.

Fondaction has increased the number of follow-ups during the ticket lifecycle, with communication at the time of handling, for example, which provides an overview of the expected resolution times. Adjusting resolution goals and closely measuring them, as well as presenting them monthly to all team members, has also improved processing times and directly increased satisfaction.

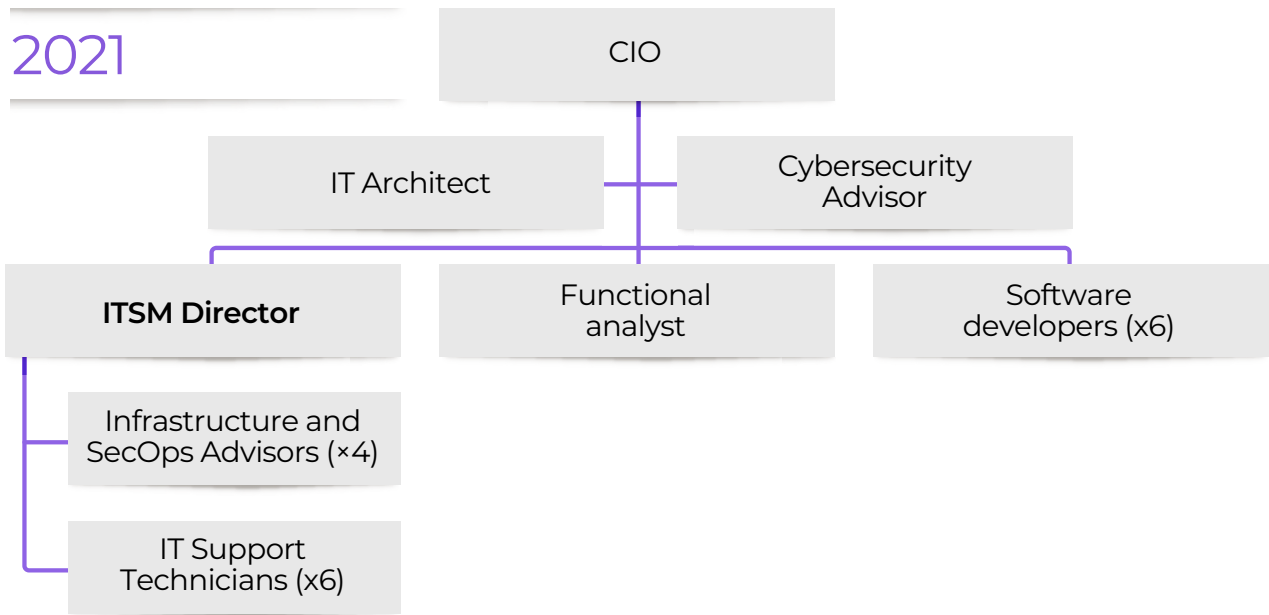
› COMPLAINTS REDUCED

A user ranking of between 1-3 out of a maximum of 5 is considered a complaint and therefore triggers a formal process to evaluate what went wrong and how to improve.

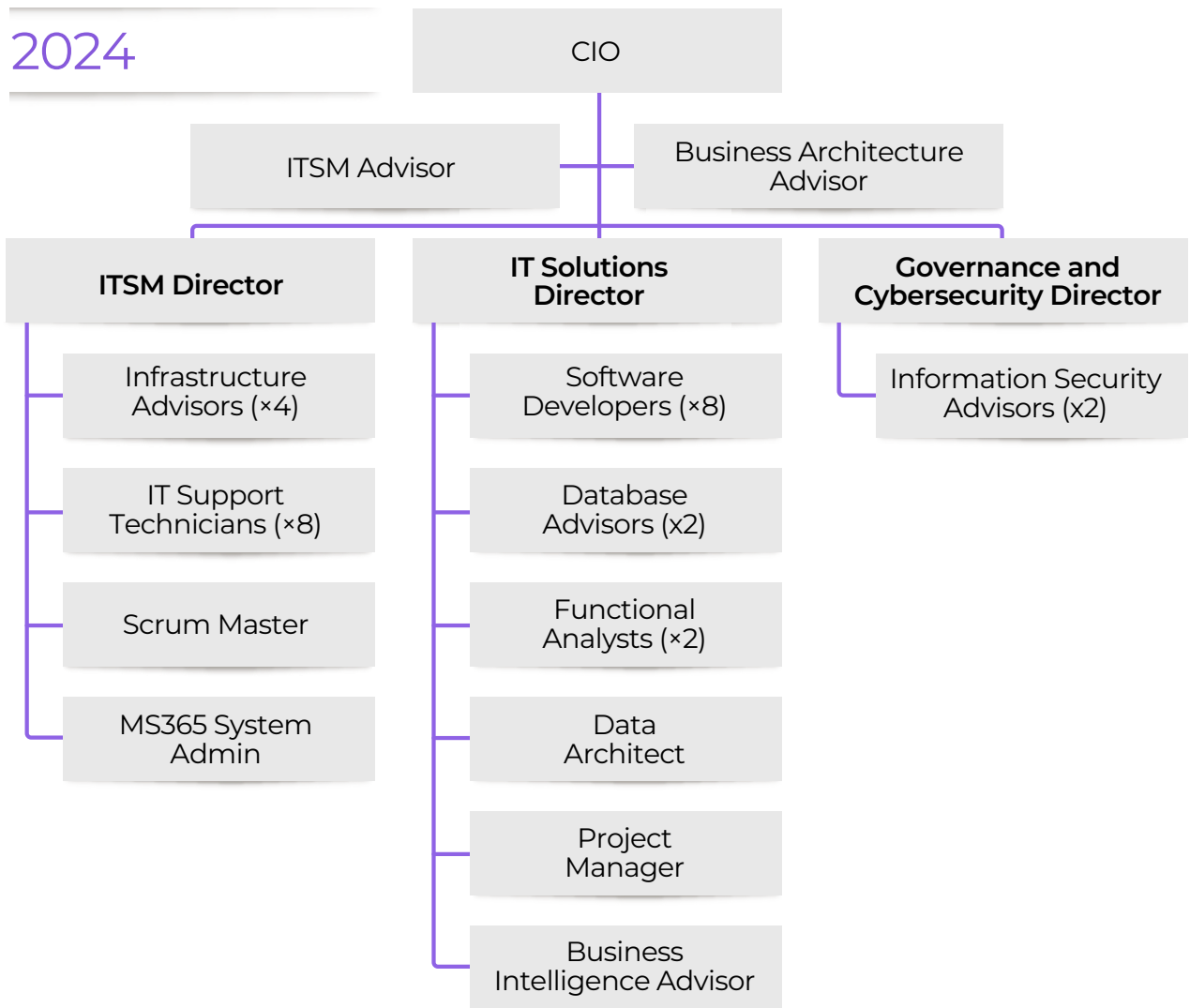
› IT DEPARTMENT STRUCTURE EVOLUTION: 2021-2024

The Fondaction IT department grew from 21 to 37 permanent employees in the period, reflecting the quantity (80%) of the company’s project portfolio which is focused on co-creating value via digital solutions.

2021



2024



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