

Transforming IT Operations:

How Aristotle Elevated Efficiency and Collaboration with Isos Technology and Jira Service Management

Aristotle is an investment management organization focused on helping clients achieve long-term financial goals with active portfolio management and a research-driven investment framework.



The Challenge

While most of Aristotle's IT teams used Atlassian Jira and Confluence, their IT service desk agents used Freshdesk, which limited cross-team collaboration and visibility. Aristotle was rapidly scaling in the number of employees and portfolios it managed. Aristotle could see the advantage of having all its IT teams on the same platform and was interested in migrating to Jira Service Management (JSM).

As a financial services firm, Aristotle is committed to the highest security standards, including voluntary compliance with SOC 2. As part of this, Aristotle had a Jira project to support any changes pushed to the production environment. Aristotle was looking to streamline these processes and leverage automation to make them more efficient.

Aristotle was looking for a long-term strategic partner to help advance their Atlassian instance as the company continued to scale. After meeting with several Atlassian Platinum Solution Partners, Aristotle determined that an ongoing engagement with Isos Technology's Managed Services team was the best fit for its needs.

The Solution

Isos partnered with Aristotle to understand its processes and needs. Then, Isos mapped out the necessary projects and workflows and implemented JSM, using automation wherever possible. Isos used Atlassian Forms to ensure comprehensive information was captured up front. User experience was a top priority, and Isos implemented Refined, a Marketplace app, to enhance this. Refined also enables Aristotle to post banner alerts and blog posts to the portal home page to keep users informed.

Isos also implemented Assets, which integrates with the company's Active Directory. When new users are added to AD, the information automatically becomes available in JSM. Aristotle uses Assets to track and manage verticals, departments, hardware, software, vendors, approvals, and more. Users who open a ticket see customized dropdown menus unique to them and their related assets. This improves user experience, streamlines ticket intake, provides context for agents, streamlines approval, and speeds time to resolution.

One complex process streamlined through the combined use of JSM and Assets is onboarding, transfers, and offboarding. When HR submits a ticket for onboarding, for example, it generates a complete list of required IT tasks. Notifications and approvals are automated, and HR, the hiring manager, and other

stakeholders have complete visibility into it every step. The initial IT portal was such a success that other service delivery teams are adopting it, including the Corporate Admin, Facilities, Human Resources, and Marketing teams.

Because Aristotle provides financial services, SOC 2 compliance is top of mind.

The Results

- **Increased visibility** – Executive-level dashboards and automated notifications ensure stakeholders at every level have visibility into the right information at the right time.
- **Improved collaboration** – Cross-functional teams and different IT teams are on a single platform and can collaborate to drive them to a successful conclusion.
- **Enhanced user experience** – The Use of Assets to support drop-down menus tailored to user roles and the implementation of Refined make for a best-in-class user experience.
- **Faster time to resolution** – The use of Assets to auto-populate tickets and Automation for Jira and JSM for notifications, transitions, and approvals speed time to resolution.

Isos is a strategic partner and an extension of our Enterprise Solutions team. They challenge us to think critically, guide us in best practices, and bring deep experience to the table that moves us forward.

— Kirk Douglas, Assistant Vice President,
Enterprise Solutions

About Isos Technology:

Isos Technology helps organizations solve complex business challenges with Atlassian tools and industry best practices to drive enterprise excellence. Whether optimizing service management, upgrading to the cloud, or developing long-term IT strategies, Isos Technology partners with teams to achieve measurable results. As an Atlassian Platinum Solution Partner, Isos specializes in ITSM, cloud migrations, and enterprise strategy. The company has been recognized multiple times as an Atlassian Partner of the Year. Since 2005, Isos Technology has helped Fortune 1000 companies and public sector organizations innovate and build sustainable success. For more information, visit isostech.com.

Project Snapshot

- Aristotle's IT teams primarily used Jira, but their IT service desk solution was Freshdesk. They wanted to consolidate everything into a single platform.
- Aristotle was also looking for a long-term strategic partner. Aristotle met with several Atlassian Platinum Solution Partners before deciding on Isos Technology.
- Isos Technology implemented JSM using Assets, Refined, and automation to customize dropdowns, streamline complex processes, and enhance user experience.
- Aristotle tracks users, software, hardware, vendors, etc., in Assets, which helps streamline complex onboarding, transfer, and offboarding processes.
- Aristotle now benefits from increased visibility into work, improved collaboration, enhanced user experience, and faster resolution time



855-924-4767
info@isostech.com

ATLASSIAN PARTNER OF THE YEAR

