

- ✔ Built two internal apps using Cherwell's codeless architecture
- ✔ Shifted to a more data-driven operational model
- ✔ Uses Cherwell beyond IT for performance measurement and tracking

Farm Credit Mid-America (FCMA) is an agricultural lending cooperative owned and controlled by their customers. They are one of the largest associations within the Farm Credit System. With more than 1,200 employees, FCMA serves nearly 100,000 customers in 94 offices through-out Indiana, Ohio, Kentucky, and Tennessee.



The Challenge

In 2012, Farm Credit Mid-America had two departments using the same highly customized commercial call logging system in completely different ways. The IT service desk used it to track and manage IT-related incidents, and the financial operations team used it to track and manage workflow initiated from the mainframe at their lending partner. Between the service desk and the financial operations department, 93 analysts, technicians, and accountants used the call logging system.

There were a number of significant shortcomings with the call-logging system that drove the search for a new ITSM solution. Increased functionality, including automation, defined escalation paths, trend analysis, and real-time dashboards and reporting, were key requirements. FCMA needed to formalize IT service management processes and wanted a tool that would enhance their ability to improve Incident, Problem, Change, Asset, and Knowledge Management processes, but could also meet the needs of the financial operations team.

After a lengthy selection process, FCMA ultimately selected Cherwell Service Management software, based on its flexibility and total value.

The Solution

One of the core values at Farm Credit Mid-America is team performance, driven by the belief the best results are achieved through open communication and cooperation. The company's culture is heavily oriented around training, transparency, and feedback. Work and performance are routinely audited, and through the use of reporting and dashboards, Farm Credit can identify bottlenecks in processes and gaps in knowledge.

Before working with Cherwell, FCMA cobbled together their commercial ITSM solution and two homegrown apps to foster productivity.

Assignment Wheel is a workload distribution solution that assigns work more equitably, thus preventing agents from cherry picking the easiest tasks. A measure of weight is applied to each assignment and, depending on the availability and skill set of the employee, tasks are assigned to the most appropriate resource to fulfill the request.



Work Review was implemented to evaluate the scope and depth of work performed on an assigned task. As assigned work is completed, a record is assigned for peer review, where col-leagues grade the steps taken to fulfill requests. Peer review provides higher levels of accountability through transparency, discouraging employees to take shortcuts that may compromise quality of work.

After switching to Cherwell, FCMA quickly rebuilt the homegrown apps using Cherwell's unique codeless design architecture. It didn't take long at all to build these apps on Cherwell's platform. As a result, there is increased and improved visibility of productivity, which FCMA did not have before. Now, these apps are used to assess training and development needs across the organization. They are also effective management tools for periodic employee reviews. Because the performance data is displayed on individual dashboards in real time, there are no surprises during reviews, and the employees are empowered to monitor and manage their performance on a daily basis.

“We found Cherwell to be a very flexible tool. The fact that it could integrate with our homegrown applications and support the processes we established within our previous solution, while requiring far less administration, was a big win for us.”

Myra Aldi, Software Engineer at FCMA

The Results

Because of Cherwell's unique codeless design architecture, many business leaders, not just IT, can generate performance metrics using Cherwell instead of mining data from multiple applications.

“With Cherwell, all the data we need is not only right there in the system, but it is also readily accessible and highly visible. This visibility has been an eye opener for our leaders, as it allows us to manage more effectively and efficiently by providing feedback to employees in real time,” says Aldi.

Within the IT organization, Farm Credit Mid-America has been able to improve their IT service support and delivery processes. But, the benefits conferred by Cherwell extend far beyond IT. Most notably, FCMA now applies the Assignment Wheel and Work Review to their loan processing department. Loan requests are weighted by complexity and distributed by employee availability, queue load, and skill set. At any point in

time, leadership can visualize individual and team performance. And using ticket review, leaders can understand which loans were reviewed with errors and/or deductions; this helps Farm Credit meet and document auditing requirements consistently.

The data and the transparency provided by Cherwell helps Farm Credit Mid-America improve capacity and plan more effectively. Recently, when loan application volume increased, the management team's first idea was to hire more people, as they had done in the past to keep up with volume. However, by using Cherwell to better track work and time, it was determined the department did not need to add a single personnel resource.

According to Aldi, “Management loves this information. No longer do they rely on ‘gut’ and ‘feel.’ They can visualize workload that supports key decisions.”