

Case study

Physicians Mutual Transforms the Enterprise Technology Group into an Agile Organization to Support New Business Initiatives

About Physicians Mutual

Physicians Mutual provides a full portfolio of individual health and life insurance products as well as retirement products. Founded in 1902, Physicians Mutual Insurance Company is headquartered in Omaha, Nebraska and has more than \$3 billion in assets and 1,000 employees.

The Challenge: Reduce Costs and Improve Operational Efficiencies and Project Delivery in the Enterprise Technology Group

The Enterprise Technology Group (ETG) is responsible for strategic and portfolio planning and execution as well as project budgets. With 200 employees in the group, the CIO along with members from the PMO began researching ways to better align the business and IT as well as improve efficiencies, reduce costs, and streamline project delivery.

Upon doing so, they quickly discovered multiple challenges within the ETG:

- Project teams formed and dissolved regularly which hindered business and system knowledge, weakened business rapport and performance consistency, and blurred ownership and accountability
- The organization used competing methodologies and processes resulting in an excessive amount of unclear or redundant documentation
- They lacked internal experience to promote and execute agile processes; previous agile training and implementation initiatives failed
- Multiple tools, multiple vendors, poor software adoption, and limited integration points resulted in a sub-optimal user experience and poor adoption
- Annual maintenance and support costs were high with little ROI
- Staff spent too much effort gathering data for management reports



Overview

Customer

Physicians Mutual

Industry

Health and life insurance and annuities

Geographies

Omaha, Nebraska

Physicians Mutual uses Planview to integrate with Rally ALM via Planview OpenSuite®, connect top-down planning with agile execution, accelerate time to market to deliver more product releases, reduce costs and man hours, and increase visibility into work and resources.

“Planview brings transparency needed to drive decision making, from the executive level to teams. We all see the same information.”

– Joan Bohannon, Project Manager, Physicians Mutual

The Solution: Connect Project Portfolio Management with Agile Execution

The decision was made to fully transform the ETG into an agile organization. The management team knew this effort required expert guidance, so Physicians Mutual turned to their technology partners, Planview and Rally Software, for support and then created clear objectives around people, processes, and technology.

- *People:* Assembled dedicated, persistent teams to establish consistent performance, accountability, and ownership as well as improve system knowledge.
- *Processes:* Reviewed all processes and documentation for both legacy and distributed practices and ensured new agile processes were supported by the technology and the revised roadmap and release schedule.
- *Technology:* Retired multiple, low-value technologies and replaced them with an integrated project portfolio management and ALM solution that would enable teams and processes while improving the user experience to create long-term value.

Once the goals were outlined, Physicians Mutual launched the integrated solution that met their criteria: Planview Enterprise® and Rally ALM. The joint solution gives Physicians Mutual visibility into the financial costs of agile projects, enables collaboration between software development and program managers, and synchronizes top-down planning with agile project execution, which result in greater visibility and business agility.

“The Planview OpenSuite integration between Planview Enterprise and Rally Agile ALM solution opened up a world of opportunities we never imagined. We are no longer a tool heavy environment.” Joan Bohannon, Project Manager, PMO Operations

Benefits: A High-Performing, Collaborative Organization That Can Quickly Respond to Change

Teams now have greater visibility into work and resources via the Planview and Rally integration. The result has been a marked increase in transparency and an earlier assessment of risks.

The Planview and Rally integration enables and supports highly streamlined processes from work intake to implementation at Physicians Mutual. As a result, the ETG is better able to execute a business and technological roadmap that generates value and ROI while giving them the ability to adapt rapidly to changes in the business environment.

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Planview Enterprise and Rally ALM solution helps Physicians Mutual:

- Realize substantial cost savings (over three years) by consolidating solutions and eliminating apps that are no longer needed
- Deliver software sooner—from four to six major product releases a year and minor iteration releases, which accelerates time to market
- Eliminate duplicate entries, copies, and meetings resulting in over 1,000 man-hours saved per year
- Eliminate hours building reports to support financial analysis, accounting, and statutory reporting
- Achieve visibility into work and resources for better project management and risk mitigation
- Reduce process documentation while gaining work and process efficiencies

