A Leading Nationwide Medical Insurance Company Transforms IT PMO into an Enterprise PMO That Delivers Business Value

Industry:
Medical Insurance

Geographies:
New York

Employees:
5,000

Planview Solutions:
Planview Enterprise One™ for Project Portfolio Management and Enterprise Architecture, Planview Projectplace™ for Collaborative Work Management, Planview LeanKit™ for Lean-Agile Delivery

▼ Planview
   Enterprise One™

☁ Planview
   Projectplace™

▶ Planview
   LeanKit™

CHALLENGE

For decades, this leading nationwide medical insurance company had a PMO operating structure that worked. The PMO was embedded in the IT organization and focused on supporting IT. However, over time, the same processes, structured methodology, and strict governance that allowed little flexibility didn't work anymore for the evolving organization. Changing market demands required faster response and agility; it was time to transform or risk being disbanded.

SOLUTION

In order to transform from a support role to a corporate asset, this leading nationwide medical insurance company PMO focused on driving business value across the enterprise, instead of simply IT. The organization and executives supported their new vision that defined how the PMO would evolve, adapt, and deliver going forward – as an EPMO that would be known as the trusted advisor and consultant for leadership. The new EPMO relies on the capabilities and data in Planview Enterprise One to provide insight into the portfolio to inform strategic decisions and drive cross-team collaboration using Planview's Work Delivery solutions.

"We realized that if we really wanted to drive value, we needed to pull back on governance and methodologies to understand what the teams need to do their jobs. Instead of saying, 'you need to do this,' we say, 'what can we do to help you do things faster and better?'"

– *Senior Portfolio Technology and Consulting Manager, Leading Nationwide Medical Insurance Company*

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About this Nationwide Medical Insurance Company

This leading nationwide medical insurance company, a nonprofit independent licensee, is part of a family of companies that finance and deliver health care services across upstate New York and long-term care insurance nationwide. Collectively, the enterprise provides health insurance to nearly 1.5 million members and employs about 5,000 New Yorkers.

Challenge: Transitioning from a Support Role to a Corporate Asset

This leading nationwide medical insurance company needed to transition from a department-centric IT PMO to an enterprise PMO in order to evolve with their growing organization – enacted with supporting the business with "just enough" governance, integrating technology and application portfolios, and enabling delivery teams to optimize work delivery that best suits their needs. Their existing organizational structure hindered them from proactively responding to rapidly shifting market demands. Everything from how the IT PMO was organized, to the support, tools, and processes it implemented, would require a transformation if the EPMO strived to be a corporate asset that delivers real business value.

Solution: Shifting the PMO from an IT Organization to a Strategic Organization Supported by Planview Enterprise One

The goal was to become more customer-focused and stewards of the tools and best practices that worked, including the portfolio, architecture, strategy, and its financial data and resource capacity planning. The team leveraged their existing partnership with Planview® and Planview Enterprise One™ to provide finance, a primary customer, visibility into the strategic value of its portfolio. By unlocking the data in Planview Enterprise One, finance, and other customers, can make more informed decisions that ultimately deliver the value needed to achieve strategic goals.

"With a vision in place, we moved onto the strategy of how we could achieve it," says a Senior Portfolio Technology and Consulting Manager at a leading nationwide medical insurance company. "We had to create delivery responsibilities, then expand our use of Planview Enterprise One and Microsoft Power BI. We also deployed Planview Projectplace™ for collaboration, and we are exploring Planview LeanKit™ for our Lean and agile delivery teams."

Over time in order to achieve transformation, the EPMO realized that iterative delivery and a supportive 'servant' leadership approach was needed. They shifted from traditional processes to agile practices that supported greater simplicity and flexibility in how work was done across the enterprise. "We realized that if we really wanted to drive value, we needed to pull back on governance and methodologies to understand what the teams need to do their jobs," says Senior Portfolio Technology and Consulting Manager. "Instead of saying, 'you need to do this,' we say, 'what can we do to help you do things faster and better?'"

The EPMO at this leading nationwide medical insurance company now leverages the capabilities in Planview Enterprise One for their integrated strategy and planning. The core of the solution is bringing project portfolio management and investment capacity planning (ICP), together with capability and technology Management (CTM) for enterprise architecture to define outcomes in the following year. As a corporate asset, it brings visibility into the prioritization process, so the right projects rise to the top. Instead of static spreadsheets, ICP provides real-time prioritization, resources, capacity, and financial data for executives to manage the strategic portfolio with less effort and time. The architecture team relies on CTM as its single repository for its entire inventory of IT assets, using it to compare multiple IT transformation scenarios and assess the impact on the IT portfolio.

Results: Enabling and Delivering Business Value

As the EPMO continues to thrive in supporting the business to make the best decisions across all portfolios from strategy, projects and programs, applications and technology, and onto work delivery, they credit the ability to optimize processes with Planview as key to delivering maximum value back to this leading nationwide medical insurance company.