

## Case Study

### WELLPOINT SHARES ITS DIAGNOSIS FOR A SUCCESSFUL RESOURCE CAPACITY MANAGEMENT IMPLEMENTATION

#### About WellPoint

WellPoint, Inc. is the largest health benefits company in terms of medical membership in the United States, and through its subsidiaries, serves the needs of approximately 34 million medical members nationwide. One of every nine Americans is a member of a WellPoint health plan.

WellPoint believes it is transforming health care by collaborating with health care professionals to improve the quality of care, creating innovative products that make health care more accessible and affordable, and improving health by providing its members the right tools and information.

#### The Challenge

WellPoint's IT organization knew it could manage its projects more efficiently, lowering costs while improving productivity, and ultimately boosting the health of the company. It first identified three gaps in its current project management: organizational planning, capacity analysis, and resource management. It believed improvements could be made by aligning organizational availability to the business priorities based on the scheduled need. Secondly, the company wanted to determine if it had the adequate resource availability with the right knowledge at the right time to complete the organization's future objectives. And finally, it needed to identify and manage the actual people who could accomplish WellPoint's goals.

"We re-directed focus from simple project success to the most value, relative to cost and other potential project investments," says Natalie Harrison, senior Process Architect Advisor at WellPoint. "We could learn not only from past mistakes, but from successes – what methodologies and processes could we turn into best practices?"

But accomplishing the three objectives would be a challenge given WellPoint's existing resource management environment. It had no single view of resource assignments, availability, or skill sets, and so could not qualify project schedules based on resource availability or quantify resource utilization and productivity. It also had limited ability to understand impacts of resource management deficiencies, such as subject matter expert shortages and conflicts.

"We had to be able to understand the impacts of new and on-going projects related to new federal mandates, high-priority ad hoc business requests, and production outage SWATs," explains Harrison. "Standardization, consistency, and visibility would be critical to our success, as well as well-defined roles and responsibilities."

#### The Solution

After first talking with internal employees about what they need most and what they viewed as the biggest challenges, Harrison and her team launched a resource capacity management project that would involve several phases and take at least three years to implement.

The first phase of the initiative consisted of three "waves" that ran concurrently. The first wave captured the current organizational landscape to assist with identified issues and planning. This included developing baseline capacity and demand, identifying resource gaps and constraints, and proposing resource changes. The second wave created a current view of processes and tools, a future for resource capacity management for WellPoint, and a roadmap to operationalize new processes and tools. Finally, the third wave established a Proof of Concept to gather more details into day-to-day requirements for resource management, created use cases for process scenarios, and determined configuration requirements for the tool.

#### AT A GLANCE

**CUSTOMER:**  
WellPoint

**INDUSTRY:**  
Healthcare

**GEOGRAPHIES:**  
North America

**USES PLANVIEW ENTERPRISE TO:**  
Manage IT Projects More Efficiently to  
Lower Costs and Improve Productivity

"The Planview Enterprise suite gives us the functionality we need to increase our visibility into actual project costs, improve data integrity and availability, offer global visibility into work schedules, and resource allocations, and leverage industry best practices for internal process improvements."

**Natalie Harrison**  
Senior Process Architect  
WellPoint, Inc.

“We also identified roadblocks, such as organizational resistance, so we would be prepared during rollout and ensure the smoothest cultural adoption,” says Harrison. “And it was critical to obtain senior management support to make this a company-wide priority.”

The solution WellPoint selected to achieve its objectives is Planview Enterprise. More than 6,000 IT and subject matter experts at WellPoint are currently using Planview Enterprise in some capacity. “After determining first where we wanted to be, the Planview solution was able to completely support where we are going,” says Harrison. “The Planview Enterprise suite gives us the functionality we need to increase our visibility into actual project costs, improve data integrity and availability, offer global visibility into work schedules and resource allocations, and leverage industry best practices for internal process improvements.”

## A Clean Bill of Health

WellPoint is now on the road to recovery and will soon boast a healthy and comprehensive resource capacity management process. Harrison admits, however, that what began as a resource management project has expanded to something much larger. “We found that organizational capacity planning impacts everything and it’s all integrated,” she says. “So the project became more of a portfolio management change.”

WellPoint now has an enterprise project management methodology in place that when fully implemented, will include a standardized process for resource management, resource assignment, resource forecasting, and resource reporting with tools for budgeting, forecasting, and work intake. It will have improved visibility into overall IT project portfolio which will enable improved decision-making through executive dashboards, reporting, and analytics. Throughout this process, Harrison plans on leveraging Planview consulting services to help configure the software and offer implementation direction and strategies.

“The plan is to implement by area, depending on the current level of maturity in that area,” explains Harrison. “Phase 2 has just begun with seven tracks that involve an enhancement to work requests, resource management, portfolio and budget time tracking, tool requirements and configuration, and reporting analytics. It’s a long process, but ultimately very worthwhile.”



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