

CASE STUDY

Healthcare Insurance Giant Creates a Healthy Professional Services PMO with KeyedIn Projects

Market research group for a healthcare leader takes charge of disparate project data, and improves results.

BENEFITS SUMMARY

- Complete visibility for end-to-end project control to empower project lifecycle management.
- The ability to forecast costs and create resource deployment plans that could justify or nix resource growth, resulting in thousands of dollars of cost containment each quarter.
- Change an over burdened project team from reactive mode to proactive mode with state-of-the art forecasting and analytics.
- Level out resource demand using resource skills databases and status reporting to accurately track costs and save hundreds of labor hours during each project deployment.

Background

A national health insurance company with 52,000 employees and \$85 billion in revenue required help with its Market Strategy and Insights PMO. The “brain trust” of the company’s marketing function—a crucial, but compact, market research group—conducts research-for-hire that has impact on marketplace growth and, ultimately, on the health and welfare of its network of providers and patients.

Real-time Visibility

“One of our primary needs was visibility and better control over our time and expenses in real-time.”

Business Challenges

In this PMO, based in the finance department, not only meeting schedules, but also cost control over all aspects of project and risk management were always top-of-mind. The key challenge was gathering data and viewing it in real time. Status reports often arrived by email, so it was impossible to see a total picture of the portfolio. Excel spreadsheets were used to track resources, budgets, and timelines. The time tracking for market research resources took place in separate work management project streams that were invisible to key stakeholders. “Prior to using KeyedIn Projects we were using spreadsheets to monitor and manage our jobs. One of our primary needs was obviously visibility and better control over our time and expenses in real-time. We also wanted to get a handle on resource management to justify expenditures and create forecasting expertise to keep costs down and customer satisfaction up,” said their Director of Market Strategy and Insights.

Critical Selection and Implementation Criteria



“The team’s honesty and transparency helped me trust them to provide the promised functionality...”

The vendor selection process began in August 2016 with KeyedIn Projects (KIP) and a short list of others. “When we were in talks to choose a solution, KeyedIn had people running the demo who delivered a compelling explanation of where the capabilities came from and why they were there. They could also plot out our specific needs very easily and understandably compared to other vendors we looked at; and the built-in functions made it unnecessary for a customized rewrite of their program to meet our very specific needs,” said the Director of Market Strategy and Insights. KeyedIn listened to the client’s requests and came through with a strong implementation process. “Our duration for the implementation is shorter than nearly all of our competitors and our consulting resources quickly institute a collaborative process which is both inclusive of understanding their business process and approach as well as extremely hands-on,” said KeyedIn Director of Implementations, Liane Christopher. The client concurred: “The team’s honesty and transparency helped me trust them to provide the promised functionality well before we got into the Sandbox. We are also confident that our feedback would be heard and invested into new KIP releases so we can grow together to become even more effective.”

Up & Running

“We were amazed at how quickly we could get our forecasting capabilities online with our entire team and receive data we could use to make impactful decisions.”

KeyedIn's Solution

During the duration from signature to go-live, clients were integrally involved with the KIP team, so testing and training were a seamless part of the overall process. KeyedIn's powerful functionality became quickly evident to their research team; the intuitive user interface did not require complex training; and, better yet, enthusiastic uptake prevailed among the user groups. Today, a group of happy, productive researchers at the marketing group headquarters find the usability of the project management solution to be a welcome addition to their lives instead of a burden.

The impact of the solution has resonated far beyond this PMO, and KeyedIn Projects is now being evaluated to become the project management software to power innovation for the entire company. “We were amazed at how quickly we could get our forecasting capabilities online with our entire team and receive data we could use to make impactful decisions,” they said. The client team said the project life cycle management aspect of their PMO solution is truly the linchpin for all of their research activity—and the innovation it delivers to stakeholders. They were able to level out resource use among stakeholders and discover areas for process change and improvement to justify additional investment in resources for strategic projects with the most business impact. An easy integration with their Domo business intelligence system also allowed them to keep the tool they have while also using all of KeyedIn Projects' reporting capabilities as enhancements. “Our people easily log in around the clock from several business functions. Executive sponsor conversations are based on real-time facts. And we've already experienced significant savings in our resource deployment by using the exact resources for the right projects and not having to recalibrate at the last minute,” said the PMO leader. “There's no black box anymore. It's all contained in the dashboards so we all know where we stand.”

About KeyedIn Projects

KeyedIn enables your PMO to be more strategic, more efficient, and deliver greater business impact by allowing you to easily forecast and allocate resources, create and analyze portfolios, gain visibility to all your projects, and discover new insights through dynamic PPM analytics.

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