Case study

Excellus BlueCross BlueShield Transforms IT with Portfolio and Resource Management

About Excellus BlueCross BlueShield

Excellus BlueCross BlueShield (BCBS), a nonprofit independent licensee of the BCBS Association, is part of a family of companies that finances and delivers vital health care services to about 1.5 million people across upstate New York. Excellus BCBS provides access to high-quality, affordable health coverage, including valuable health-related resources that members use every day, such as cost-saving prescription drug discounts and wellness tracking tools.

Challenge: Lack of Accurate Data

The new CIO and senior leadership at Excellus BCBS wanted to know what every person in IT was doing at any given moment. However, the reality was that decisions were based on inaccurate data found in manual spreadsheets, Microsoft Project, and many homegrown applications. Excellus had data everywhere.

"Without actual data, we couldn't answer the most basic questions, like 'Are we doing the things we should be?' and 'Do we have the right resources?'" says Stacie Mastin, Manager in the Capacity and Planning department at Excellus BCBS.

In fact, only 69 percent of team members were submitting timesheets, and much of the work was being categorized under "miscellaneous" tasks. Resource structures in Planview Enterprise were outdated, there were no standards, no archiving, and financials weren't being loaded at an acceptable frequency. To make things worse, there was no visibility into resource capacity or what resources were doing—where they were spending their time and why. Resources were given projects haphazardly without any regard to how much work they could take on or how delays were impacting estimates.

All the challenges Excellus BCBS faced boiled down to one underlying culprit: the data. Without people using Planview Enterprise to accurately input their requests, estimates, and work, reporting was difficult and useless. Without reliable reporting, decisions were based on guesses and gut feelings rather than real data.

Mastin says, "We couldn't make data-driven decisions and had no governance or alignment. We had to get control of our portfolio, and the only way to do that was to use Planview Enterprise the way it was intended." She was given the responsibility to overhaul IT to develop and execute a working and long-term capacity & planning strategy. Even with the challenges identified, Mastin was confident they could turn things around.

Excellus 🅑 🛡️

Overview

Customer
Excellus BlueCross BlueShield

Industry
Health Insurance

Geographies
North America

Excellus BlueCross BlueShield uses Planview Enterprise for time tracking, resource utilization, demand management, planning, and reporting.

Solution: Improve Data Quality in Planview Enterprise to Drive Decisions

Mastin immediately developed a plan to execute a working and long-term capacity planning and resource management strategy, including demand, capacity, activity, backlog, bottlenecks, and administrative. She assessed the current state, capabilities, and tools, having conversations with each department about needs and capacity so she could determine what was working and what wasn't.

"I reviewed all of our reports and couldn't believe how many we had," she says. "It was obvious we needed to educate our users and help IT run more like a business."

The first step was to manage timesheet submissions by convincing IT of its value through senior management monitoring and support. To reduce "miscellaneous" work entries, administrative tasks were defined into five categories where all work must fit.

The next step was to increase business engagement. "We worked with one business unit at a time because we realized if we could get them on board, they would recognize the benefits of Planview Enterprise and talk about them to other units," says Mastin. "The news spread that they finally had data to back up their claims of needing more resources. This was a powerful testimony and proved how something as simple as inputting time could benefit everyone."

Mastin also streamlined work breakdown structures in Planview Enterprise. She set the requirement that users could add and complete tasks but not delete them. This helped improve reporting. They could see what people were doing, so they could understand by a project perspective where time was being spent and in what phase, improving resource management.

Production support and resource demand were next on the list. "We now understand demand and how it is prioritized. We also have a breakdown between our brake/fix, operations, currency, and capacity," says Mastin. "We can tell where people are spending their time and whether it is an efficient use of resource time."

Time utilization was a running theme through this initiative. Mastin based her goals on Gartner recommendations to identify how much time is being spent in each phase. "Gartner says we should only spend 10 percent of our time in the analyzing phase, but we found we were spending 60 percent," she explains. "We had to ask what we were doing and what needed to change."

> *"We now understand demand and how it is prioritized. No matter the question or the issue, people can present data, have the right conversations, and make sound decisions."*
>
> *– Stacie Mastin, Manager in the Capacity and Planning Department at Excellus BCBS*

Planview Enterprise has found its proper place as the single source of truth for Excellus. Data is now loaded into Planview Enterprise daily, there are nightly updates to financials, and the work breakdown structure is updated once a year. Annual planning has accelerated and the strategic portfolio at Excellus is now ranked, prioritized, and lives entirely in Planview Enterprise, enabling them to know that they are doing the right work at the right time.

For Mastin and her team, the greatest value has come in the form of the quality of data they now have. "Data drives every decision we make," she says. "No matter the question or the issue, people can present data from Planview Enterprise, have the right conversations, and make sound decisions." The team can facilitate discussions and answer questions to deliver mandated projects on time and in compliance. The CIO and leadership team can count on the information and visibility delivered through Planview Enterprise.

Benefits: Better Decisions and Greater Control

By implementing Planview Enterprise:

- Timesheet submission rate has improved to 99% with a rolling 18-month capacity plan

- Data driven decisions and labor forecasts are based on actuals

- Senior leadership has visibility into portfolios to ensure compliance

- The portfolio is ranked, prioritized, and properly aligned with resource capacity to deliver mandated projects on time

To learn more about what Planview Enterprise can do for you, visit Planview.com.

PLANVIEW®