INSURANCE COMPANY LEVERAGES KANBAN TO IMPROVE DELIVERY SPEED BY 65%

Discover how the IT operations teams in an insurance company realized significant gains in efficiency, productivity, and delivery speed – all without hiring extra consultants.

> ***Using Planview LeanKit makes the work a lot more efficient. Now we can focus on the work at hand, as well as on planning and distributing work."***
>
> ***– Patricia, Service Manager at European Insurance Company***

INDUSTRY: Insurance // **GEOGRAPHIES:** Global

DEPARTMENT/TEAM: IT Operations

EMPLOYEES: 125,000

a case study presented by planview

RESULTS

65% IMPROVEMENT IN DELIVERY SPEED

21% RISE IN PRODUCTIVITY

93% OF DEFECTS RESOLVED WITHIN SLA
(Service-Level Agreement)

90% DELIVERY PREDICTABILITY RATE

50% FASTER INFORMATION SOURCING
By integrating LeanKit with their request management tool, analysts and developers have cut the time they spend searching for ticket-critical information by 50% — a key factor in enabling the above improvements

RAPID ADOPTION ACROSS IT
When the maintenance team began using LeanKit, the group started with 10 licenses. Today, more than 525 people have adopted Kanban and LeanKit within IT operations.

A TRANSFORMED WORK ENVIRONMENT
The team has experienced several benefits related to the team's culture, mindset, and ways of working — including motivation and collaboration — which has positively transformed their work environment

CASE STUDY PROFILE

Meet Alex and Patrícia

Based in Portugal, both Alex and Patrícia work as service managers on the maintenance delivery team (a subgroup of IT). Although they share the same title, their roles are different: Alex works on projects related to tooling changes and improvements, while also serving as an Agile/Kanban coach. Patrícia focuses on flow management and process improvement, with the goal of coordinating teams to complete work quickly, efficiently, and without compromising quality..

THE SOLUTION

> ***"Working with list-based tools and physical Kanban boards made collaboration very difficult for a globally distributed team. We couldn't tell there were problems until they had already caused us to fall behind."***

SUMMARY OF NEEDS

- Visualize the volume and inflow of tickets
- Share information quickly and easily with analysts and developers in multiple locations
- Scale and mature their Kanban practice across globally distributed teams
- Generate automated KPIs in real time
- Get leading indicators of risks and issues

Bogged Down by Disparate Tools

Handling a steady stream of requests is the nature of IT operations work. However, the stream of requests had become a deluge for the maintenance delivery team: Even though the analysts and developers tackled new tickets every day, they still had a sizeable backlog that impacted their delivery KPIs. At one point, the team's delivery predictability rate was as low as 60%, and its time-to-resolve KPI hovered at 72%.

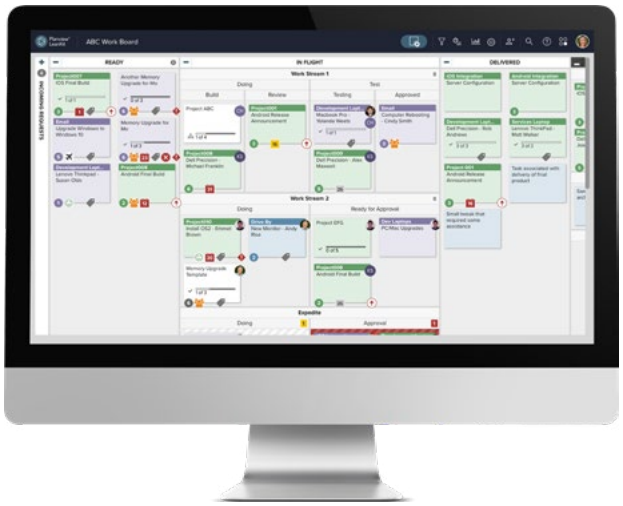
In large part, the team's challenges stemmed from using three different tools to track requests: physical Kanban boards, spreadsheets, and lists generated by their ticketing system. Using a mix of physical and digital tools prevented the globally distributed team from sharing information quickly. It also made analysts and developers more prone to context-switching — the time- draining side effect of working on too many tasks at once — and made calculating KPIs a laborious, mostly manual process.

The service manager Patrícia offered this summary of the way things were: "Working with list-based tools and physical Kanban boards made collaboration very difficult for a globally distributed team. We couldn't tell there were problems until they had already caused us to fall behind." As a result, managers often had no leading indicators of problems or bottlenecks until the issues were escalated, which impacted delivery speed.

"We needed a digital Kanban tool that would allow us to communicate and collaborate without difficulty, while enabling us to see and solve problems quickly," said Alex. Their two main goals were to boost efficiency and find a better way to manage their ticket backlog — so they could deliver more value, more quickly to their customers.

THE SOLUTION

When we were comparing tools, we found that Planview LeanKit was distinctively better in flexibility and Kanban board design.



Planview LeanKit main board view

Visualizing Work and Integrating Tools

Alex and Patrícia wanted a system that would support their recent adoption of Lean/Kanban principles. They selected Planview LeanKit for its advanced Kanban features and flexibility.

"When we were comparing tools, we found that LeanKit was distinctively better in flexibility and Kanban board design," Alex said. The swimlane functionality allowed the team to easily mimic the design on their physical boards — all without needing a developer to build the board or modify it.

By integrating LeanKit with their request management system, analysts and developers based in any of the team's global locations can see a single view of their ticket backlog as well as all of the tickets in progress. There's no more searching through list-based tools to know who's working on which tickets, or where the tickets are in the team's process. They just map the LeanKit card ID to the request from their ticketing tool and watch how the cards are moving across the board to see progress.

A KANBAN BOARD

displays the team's process for completing work, giving them a view of who is working on what, and where the work is in the process.

A KANBAN CARD

represents a piece of work — a project, task, or other work item that team members move through their team's board to reflect progress

and use to signal any issues.

KANBAN SOFTWARE

is an online system of boards, cards, and automated reports used for visualizing work, managing workflow, and continuously improving processes.

> ***Compared to spreadsheets and list-based tools, using Planview LeanKit makes it a lot easier to organize work based on priority and urgency."***

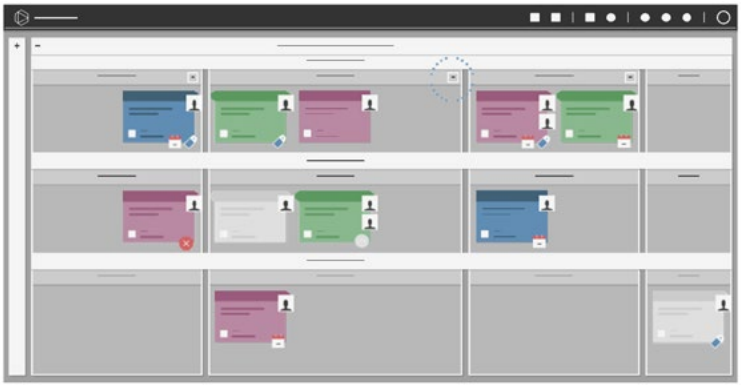
Spotting Problems and Responding Swiftly

When a problem arises, analysts and developers use the blocker icon to signal cards that are stalled or at risk of missing their SLA. Whether it's a ticket, bug, or announcement, the entire team knows the status, which means managers like Alex and Patrícia get leading indicators of problems or bottlenecks, instead of being surprised by an issue.

Before LeanKit, planning and prioritizing happened only once a day. According to Patrícia, the process was "quite long," requiring them to download and compare multiple lists. "Compared to spreadsheets and list-based tools, using LeanKit makes it a lot easier to organize work based on priority and urgency," she said.

By visualizing their workflow from backlog to archive, and by using card icons to indicate class of service, managers can re-prioritize work several times per day — a truly agile approach to planning. Combining agile planning with work-in-process (WIP) limits adds an extra level of focus for the analysts and developers by pinpointing the high-value work. There's no need for team members to track down managers or for managers to track down team members: a quick check of their LeanKit board is all that's needed.

A WORK-IN-PROCESS (WIP) LIMIT is a constraint applied to parts of a workflow (e.g., a process step or lane on a Kanban board), or to an entire workflow. It helps prevent potential bottlenecks that hinder the continuous flow of work through the system.



THE RESULTS

> ***The entire team can focus on the work at hand and how the work is being planned and distributed. It makes the work a lot more efficient.***

Leveraging Planview LeanKit

By combining LeanKit with a steadily maturing Kanban practice, the maintenance delivery team has achieved significant gains in efficiency, productivity, and delivery speed — all without hiring more consultants. "The entire team can focus on the work at hand and how the work is being planned and distributed. It makes the work a lot more efficient," said Patrícia.

Visualizing their work and using WIP limits to control how much work was in process at one time enabled the team to not only improve its average cycle time, but also make it more stable. As a result, analysts and developers have increased the business value they ship to their customers, by delivering more improvement features that are also more predictable in time, quality, and scope.

65% IMPROVEMENT IN DELIVERY SPEED
(cycle time of defects built)

21% RISE IN PRODUCTIVITY
(throughput per resources capacity)

93% OF DEFECTS RESOLVED WITHIN SLA — UP FROM 72%
(time-to-resolve KPI)

90% DELIVERY PREDICTABILITY RATE — UP FROM 60%
(average priority defects fixed within four days' cycle time)

THE RESULTS

> ***Using Planview LeanKit has made working a lot more fun! The teams are motivated and empowered, because the work is visible to everyone.***

Transforming the Work Environment

For the maintenance delivery team, the quantifiable results are only part of their story. Alex and Patrícia also report a variety of non-tangible benefits in the team's mindset, culture, and ways of working, including:

- Better collaboration among cross-functional teams
- A proactive, rather than reactive, approach to work
- Easiness of offshore team engagement as "one team"
- Increased focus, by reducing multitasking
- Improved team motivation and self-empowerment

These shifts contribute to transforming the work environment for the analysts and developers. According to Patrícia, "Using Planview LeanKit has made working a lot more fun! The teams are motivated and empowered, because the work is visible to everyone."

50% FASTER INFORMATION SOURCING

By integrating LeanKit with their request management tool, analysts and developers have cut the time they spend searching for ticket-critical information by 50% — a key factor in enabling the team's improvements in cycle time, productivity, defect resolution, and predictability.

RAPID ADOPTION ACROSS IT

When the maintenance team began using LeanKit in 2014, the team started with 10 users. Today, more than 525 people have adopted Kanban and LeanKit within IT.

THE RESULTS

> ***I think that what we've been able to do is something that all teams can apply to their own processes, sothey can learn, improve, and gain efficiency."***

A Look Ahead

From the beginning, Patrícia and Alex knew that Planview LeanKit was a tool that could grow with them as they advanced their Kanban practice. The first step was to boost their efficiency and have a better way of managing their ticket backlog, two goals they have achieved by leveraging LeanKit's visualization and Kanban capabilities. But now that they've stabilized improvements across critical KPIs, their next phase involves diving into LeanKit's auto-generated metrics and reporting so they can use the data to expand their continuous improvement efforts even further.

The combination of LeanKit and Kanban is something that Alex and Patrícia see as a benefit not only for their team's continued success, but also for other IT and business functions across the business. Patrícia explained it this way: "I think that what we've been able to do is something that all teams can apply to their own processes, so they can learn, improve, and gain efficiency."

LEARN MORE ABOUT PLANVIEW LEANKIT

As the leading enterprise Kanban tool, Planview LeanKit helps organizations visualize work, optimize processes, and deliver value faster. More than 50,000 teams of all types – including software development, IT operations, DevOps, and their extended value streams – rely on Planview LeanKit every day to apply Lean-Agile principles to their work.

Planview LeanKit™

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