

CASE STUDY

Vertafore Speeds Product Delivery with Integrated Planview AgilePlace and Microsoft Team Foundation Server



INDUSTRY:
Insurance

GEOGRAPHIES:
U.S., Canada, India

EMPLOYEES:
5,000

PLANVIEW PRODUCT:



CHALLENGE

With a diverse environment and an extensive workload, Vertafore was looking for a tool that would allow it to pursue Lean-Agile principles without being prescriptive. At the same time, it wanted to give teams consistency in how it tracked workflows, while also improving efficiency, increasing speed of delivery, and supporting its commitment to continuous improvement.

SOLUTION

Vertafore's IT organization chose Planview® AgilePlace to bring transparency and accountability to work while allowing teams to use their preferred work methodologies. By integrating and syncing AgilePlace with Microsoft Team Foundation Server (TFS), the company was able to dramatically improve time efficiency and boost productivity without introducing complexity.



"The team improved their effectiveness and AgilePlace proved itself to be a critical tool that not only enabled that success but provided visibility into the entire process."

– PASCAL PINCK, DIRECTOR
OF PRODUCT DEVELOPMENT
CAPABILITIES AT VERTAFORE

ABOUT VERTAFORE

Vertafore is the leading provider of integrated technology and information solutions for the insurance industry, serving more than 20,000 agency, carrier and managing general agent (MGA) customers. Founded in 1969, Vertafore is headquartered in Denver, Colorado and employs 1,200 people.

CHALLENGE: SPEEDING PRODUCT DELIVERY THROUGH EFFICIENT PROCESSES AND FLEXIBLE WORK METHODOLOGIES

Vertafore's IT organization consists of 500 employees distributed across eight U.S. locations and three offshore sites. Years of numerous acquisitions resulted in an extremely heterogeneous environment in terms of diversity in its teams, technologies and tools. Even with Agile practices and Scrum framework in place, it became apparent that following a single methodology wouldn't accommodate the diversity of Vertafore's teams. Pascal Pinck, director of Product Development Capabilities, says, "We wanted a more flexible approach that allows teams to work the way they want while improving organizational effectiveness."

SOLUTION: INTEGRATING PLANVIEW AGILEPLACE WITH MICROSOFT TEAM FOUNDATION SERVER

With previous experience with Planview® AgilePlace, Pinck and his team were confident it could provide the enterprise Kanban capabilities it needed to be able to pursue Lean-Agile principles without being prescriptive. It would also provide much-needed transparency and consistency to track the movement of work. "AgilePlace has helped our organization embrace a Lean-Agile framework, allowing our IT organization to develop and deliver products faster and more efficiently," says Pinck. "We now have a common set of principles and the supporting technology to give each team the flexibility to work in a context-driven way without hindering innovation and experimentation."

Planview AgilePlace is primarily used to manage Vertafore's product development and delivery processes. Some teams create a new board for each release, while others use the same board to maintain a continuous flow of work. Additional boards are used on an ongoing basis

to manage cross-functional forums and interruption-based work such as production defects.

Vertafore integrated Planview AgilePlace with Microsoft TFS, with AgilePlace managing the flow of work for faster delivery, such as visualization, collaboration, identifying bottlenecks and limiting work in progress. Highly integrated product families use TFS for version control, defect and work item tracking, and build management. Together, engineers save time and increase productivity by not having to duplicate entries in both systems. Each time a new work item is created in TFS, a card is automatically created in AgilePlace using the TFS ID and is added to the appropriate board. Likewise, when a work item is moved to "Done" in Planview AgilePlace, it is automatically closed in TFS.

RESULTS: WORKFLOW MANAGEMENT FOR MORE EFFICIENT, FASTER PRODUCT DELIVERY

With Planview AgilePlace, Vertafore now has an easy way to visualize, prioritize and sequence work. The tool also provides the desired flexibility and freedom to allow teams to control how they execute work. More benefits have come with the AgilePlace-TFS integration. "The true value of the integration is the peace of mind we have knowing that our two critical systems are in sync," says Pinck. "The team improved their effectiveness and AgilePlace proved itself to be a critical tool that not only enabled that success but provided visibility into the entire process." In less than a year, 667 active AgilePlace cards have been synched with TFS work items.

FUTURE: FOCUSING ON CONTINUAL IMPROVEMENT

Pinck says as more people benefit from the integration, the more ideas they are generating to leverage its capabilities. Planview AgilePlace is enabling each team to experiment and see the results. As a result, it is helping the IT organization drive cultural change around Lean-Agile concepts and become more sophisticated in its practices. "AgilePlace delivers optimal flexibility at the team level while providing a standardized data model that allows us to generate rollup reporting for management and executive levels," he says. "We will continue to use AgilePlace to increase our organizational effectiveness and value to the business."

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