

Case study

BlueCross BlueShield of North Carolina Uses PPM to Optimize Resource Capacity

Background

BlueCross BlueShield of North Carolina (BCBS NC) is a leader in delivering innovative health care products, services and information to nearly four million members. BCBS NC is the largest health insurer in North Carolina with more than 4,500 employees. The company has been a Planview® customer since 2010 and uses Planview Enterprise® to manage \$100 million in projects and 1.5 million resource hours in 2014 alone.

Challenge: Needed a Better View into Demand and Capacity

Lacking an integrated view of demand and capacity, the organization found it difficult to prioritize and communicate pipeline demand without restraining resources. BCBS NC wanted to improve the management of work, resources, investment planning, and reporting.

With the new federal health care mandates, BCBS NC found its portfolio doubling from 700K hours in 2012 to nearly 1.5M hours in 2014. Governance was even more important, as was being able to forecast demand and capacity for accurate investment planning. Expanding reporting capabilities became a top priority to provide executives with the information to make critical business decisions and ensure the portfolio was being monitored against strategic targets.

“With a half-dozen internal delivery partners, we needed to look at how to best manage within the PMO to broaden our view to understand supply, demand, capacity, and systems,” said Brad Clark, Director, Enterprise Portfolio Management at BlueCross BlueShield of North Carolina.

“We needed to get a better handle on accessing data for management decisions and fine tune some processes,” says Betsy V. Stikeleather, Manager in the Enterprise Portfolio Management division at BlueCross BlueShield of North Carolina.



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Overview

Customer:

BlueCross BlueShield of North Carolina

Industry:

Insurance

Employees:

4,500 employees

Geographies:

North Carolina

BlueCross BlueShield of North Carolina uses Planview Enterprise to balance demand from multiple sources and assign work to resources to ensure the most valuable projects are delivered.

“This has really paid off to help us understand capacity and planning for the next 12 to 18 months.”

– Brad Clark, Director, Enterprise Portfolio Management, BlueCross BlueShield of North Carolina

Solution: Prioritizing High-Value Projects and Optimizing Resources

BCBS NC turned to Planview Enterprise to help them apply the Capacity Quadrant – Visibility, Prioritization, Optimization, and Integration – to make the best use of their resources and focus on work that creates value and aligns to their plan. Using scoring model capabilities in Planview Enterprise, they can now weigh benefits and risks and make strategic decisions so the right projects are chosen for investment.

“With prioritization built into every step, we can re-prioritize as we go through the projects. Rolling planning is something everyone can buy into,” he said.

The insurance company is also focused on optimizing resource capacity so the right mix of work is being tackled at the right time. “We struggled with data all over the place in various spreadsheets,” Clark said. Using integrated investment and capacity planning capabilities in Planview Enterprise, they can now make sure staffing is done strategically to maximize value and productivity. Disparate groups come together to focus on efficiency and make sure staffing and resources were distributed based on project prioritization. “This has really paid off to help us understand capacity and planning 12 to 18 months out,” Clark said.

Analytics and Reporting in Planview Enterprise provides on demand, timely, and branded reports with executive dashboards that can be expanded into more detail for project managers. These more granular reports give BCBS NC pipeline detail, actual, and forecast detail by portfolio and then project, and staffed and unstaffed work information so the resource managers can identify resource gaps. Status detail at every level provides decision makers the data they need to ensure capacity can meet demand now and 18 months in the future.

Another issue was with resource planning, particularly around requirements and reservations that were creating bottlenecks. Using Planview Enterprise requirements and allocations, BCBS NC is able to forecast demand 12-24 months ahead and use that information to allocate resources weekly. Roles are better defined with more detail to give greater insight into capacity and demand.

Benefits: Aligning Projects and Maximizing Productivity

Integrating planning from both the top-down and bottom-up, BCBS NC is managing change effectively and ensuring their most valuable resources are working on their most important projects – while continuously adjusting the plan.

Using Planview Enterprise, BCBS NC has realized the following benefits:

- Resources are optimized by focusing staff on efficiency and value
- Work is prioritized and aligned to roadmaps for better visibility
- Investment planning is used to maximize portfolio and staff productivity
- Plans can be integrated to measure real-world capacity and demand
- Demand is prioritized by capacity and role
- Eliminated 1.5 business days out of creating its weekly portfolio status report
- Improved project manager administrative time by 30 percent
- Improved demand forecasting ability at role level for its IS department
- Extended its planning horizon 12-18 months with the ability to peek into the future with confidence

“Using investment planning, at the earliest point in our history, we understand our work for the next year,” says Stikeleather. “Even better, we know how to resource it, particularly with our increasing number of vendors and platforms.”

Now that management has better, timelier data in easy-to-read reports, it can make the decisions necessary to ensure the company will continue to be a healthcare leader ready for whatever the future mandates and requirements may bring.

To learn about what Planview Enterprise can do for your organization, visit [Planview.com/PlanviewEnterprise](https://www.planview.com/PlanviewEnterprise).

