

## CASE STUDY

# Guardian Leverages Ideation to Drive Agile Innovation



## INDUSTRY:

**Financial Services**

## GEOGRAPHIES:

**North America**

## EMPLOYEES:

**9,000**

## PLANVIEW® PRODUCT:



## PLANVIEW SOLUTION:

**Planview Innovation Management**

## CHALLENGE

In response to the financial industry's technological advancements and shifting trajectory, Guardian leadership made it clear that it was ready to grow its business in new and innovative ways. Guardian turned to the expertise of its 9,000+ colleagues and network of over 2,500 financial advisors, from those leveraging big data to those in daily contact with customers. Believing that the best innovations come from cooperation and shared learnings, Guardian needed a solution that could quickly bring together ideas and infuse innovation across its ecosystem.

## SOLUTION

Planview's Innovation Management solution would become the intake system for a comprehensive innovation management program created to engage all segments of the Guardian community from employees and financial representatives to external partners and universities. The lift in collaboration and creative interaction at a grassroots level enabled Guardian to ideate and deliver solutions to meet the growing needs of an increasingly digital world.



"It was just tremendous how we were able to go from implementing something in three to six months to implementing something in a matter of weeks."

– KRISTOPHER IRELAND,  
TECHNOLOGY & INNOVATION  
STRATEGIST

## ABOUT GUARDIAN

Every day, Guardian helps 29 million Americans secure their futures through a range of insurance and financial products for individuals, at the workplace, and through government-sponsored programs. A Fortune 500® mutual company with over 160 years of history, the Guardian community comprises over 9,000 employees and a network of over 2,500 financial representatives.

## CHALLENGE: BOLSTERING AGILE WITH HUMAN-CENTERED APPROACH TO INNOVATION

The financial services industry no longer stands at the crossroads between the traditional methods of business and the new ways of working – a definitive path has been chosen. From the introduction of the first smartphone to over two billion consumers engaging in mobile commerce in less than one generation, financial services companies are facing the most significant period of change since the Industrial Revolution. And it's not just about how technology is changing processes; it's also about how a new standard of consumer expectations and demands is emerging. Guardian welcomes this revolution.

Guardian believes that innovation and experience are at their best when they work together. That's why, as a company with over 160 years of history, its leadership team knew that in order to foster the human-centered approach to innovation that resonates with modern, empowered consumers, the first place to turn was the expertise of its employees – all 9,000 of them.

Guardian leadership entrusted the ambitious challenge of introducing and expanding a massive grassroots innovation program across the enterprise to Kristopher Ireland, Technology & Innovation Strategist. Kris and his team began looking for technology solutions robust enough to enable Guardian to extract ideas from across its Guardian's entire ecosystem, centralize those ideas for evaluation and development, and provide visibility throughout the lifecycle of every new concept. The solution also needed the flexibility to be elegantly nestled fit within Guardian's Agile environment, infusing innovation directly into its the Agile Release Trains (ARTs) – long-standing, cross-functional teams focused on delivering value to customers.

## SOLUTION: ADVANCING TECHNOLOGY TO COLLABORATE MORE AND INNOVATE FASTER

Guardian's leadership believed that somewhere in the minds of its employees and partners were the ideas that would enable the company to anticipate and solve for rapidly changing customer needs. Working with Planview's Innovation Management solution, Kris and his team built what they call named 'The Idea Marketplace' as a hub for employee challenges, design thinking workshops, ideation workshops, and hackathons.

Planview's innovation management platform helped Guardian put out a company-wide call for ideas that would improve products or process to those with the potential to revolutionize the financial services industry. The focus was on themes like automation, big data, cloud, security, and digital engagement and outlined specific benefits such as increased revenue, reduced costs, ways to better manage risk, or enhance customer loyalty.

Product Owners (POs), Product Managers (PMs), and ART team members could now just as easily ideate and collaborate with

colleagues who were thousands of miles away as those who were across the hall. "We increased our employee engagement in innovation tremendously," says Kris. "Any ideas that made it through an employee challenge and were selected to move forward got put into The Idea Marketplace. Anyone at the company had access to this; they could look and see where the idea was from concept to prototype to MVP, and whether it had been launched," continued Kris. "The winning ideas were implemented that next PI (Program Increment). It was just tremendous how we were able to go from implementing something in three to six months to implementing something in a matter of weeks."

Whether an idea was implemented or backlogged for future consideration, Planview's solution made it easy for Guardian to empower teams to develop ideas around their needs and passions. "That grassroots approach was really the driving force behind changing and fostering our culture of innovation so rapidly, says Kris.

## RESULTS: SHIFTING BUSINESS OUTCOMES WITH A ROBUST IDEA PIPELINE

Since launching its enhanced innovation program in 2018, Guardian has conducted over 70 challenges, Shark Tanks, and Hackathons. More than 7,000 employees have participated in various ideation challenges and events, together with over 60 partners and upwards of a dozen universities. From this high level of engagement, Guardian has developed over 100 prototypes and implemented close to 150 new ideas.

Along this journey, ideas in development have ranged from a matchmaking service to help potential clients find the right advisors, to new ways technology can be used to deliver more meaningful interactions with clients. Other transformation innovations have led to improvements in operational efficiency, creating space for financial advisors to spend more time working with people rather than paper.

Guardian's "enthusiasm for innovation," as Kris calls it, "has led to a drive in collaboration and creative skills within our employee base." By infusing innovation directly into their Agile ways of working, Guardian has gained the capability to ideate and deliver solutions faster across all product lines."

## FUTURE: DELIVERING WHAT'S IMPORTANT TO CUSTOMERS NOW, AND YEARS FROM NOW

What if in the future you could get a discount on your dental insurance as a reward for good oral hygiene? Or what if you never had to file an insurance claim again? Guardian is looking to leverage its comprehensive innovation program to create organizational efficiencies and drive a differentiated customer experience.

Continuing to build on the Planview® platform, Guardian is "looking at potentially using the platform for a simulation lab where we're able to get some feedback on current processes at Guardian and also to get feedback on prototypes as we build them," says Kris. With a mindset for innovation and the right solution in place, Guardian is well-positioned to remain one of the largest and most highly rated mutual insurance companies in the U.S.

See what Planview solutions can do for your organization. View demos on demand at [Planview.com/demos](https://planview.com/demos).

