

CASE STUDY

Insurance Company Finds Capability and Technology Management “Indispensable” in Maturing Their Architecture Organization

Challenge: Insufficient Tools to Manage Technologies and Applications

The insurance company’s initiative to gain control over its infrastructure began when operations developed a configuration database (CMDB) as a repository to house dispersed business applications, technologies, batch jobs and anything else that appeared on a console in the computer data center. From there, data was manually inputted into spreadsheets. Those who managed these spreadsheets quickly became overwhelmed, asking for a better tool.

Even with the addition of a new governance platform, staff was still required to manually load it with the CMDB data from the spreadsheets. “The platform was just a reflection of the bad data we had over the years,” an enterprise architect. “It was better than what we had before, but wasn’t where we needed to be. It was a flat database that didn’t reveal relationships. It was impossible to get data out of it except through the spreadsheets we all loathed.”

Because the company’s applications were disconnected, it lacked the single view of the infrastructure that was needed to meet compliance, assess risk and security, and ultimately provide product owners and account management structures the data they needed to contribute to strategic initiatives. Even more challenging was the fact that all the information in every system was editable by the users of that system. Application names varied as much as the quality of the data. The data was considered unclean, yet critical decisions by the CIO and senior leadership team were dependent on it.

An executive decided that it was time to bring in a purpose-built solution to manage the application and technology portfolios that would give him and other business leaders better quality data for better decisions that were impacting broader business initiatives.

Overview

Industry

Insurance and Financial Services

Geographies

Global

Employees

7,500

The Planview solution for capability and technology management has become a vital IT system, helping the insurance company mature their architecture organization with a repeatable process that brings visibility into user challenges and delivers better data for better decisions.

Solution: Single Source of Ownership for Every Shared Property

Planview's solution for capability and technology management (formerly Planview Troux®) was chosen as the golden source of record. Initial success was realized by product owners and operations teams that found value in the quality of data. Now architects are implementing workflows that feed the project data used by product owners and operations. "The architectures validate that the governance they are capturing for their projects is correct and complete," says an enterprise architect. "This source of information comes from within application portfolio management in the portal, which is fantastic. It makes their lives easier by getting the data they need much faster."

Today, Planview's solution for capability and technology management is the source of record for all of the company's business applications, capabilities, product owner management structures, and enterprise architecture governance. The solution aggregates data from the key systems, such as configuration management databases (CMDBs), Project Portfolio Management (PPM) tool, and the governance platform. The team identified every piece of shared data within these major IT systems and a single system of ownership for all data, making application portfolio management (APM) an indispensable enterprise architecture approach for the company.

"When we began our journey in APM, we had a vague idea from where we would pull data," explains an enterprise architect. "This list changed as we brought in more users. You must understand your audience - who needs or cares about what? What don't they know they need, that you can supply? How can you help them do their jobs better and give them the data to do it?"

As with any new process or technology, the key to adoption is evangelizing the benefits and value of the solution. An enterprise architect wanted users to grasp the importance of managing the portfolio of applications with capability and technology management, so he engaged the marketing team to develop an infographic that is frequently updated to illustrate the solution's impact on the company.

"The solution brings together information, technology, applications, business architecture, goals and strategies, and investments into a single, consolidated view. That kind of insight is priceless."

– enterprise architect

"When you can discuss with potential users how you are pulling data from siloed repositories and relating it together, they get it," an enterprise architect. "Capability and technology management is an aggregator - giving users data they can't find anywhere else. Even better, it helps them understand relationships. The solution brings together information, technology, applications, business architecture, goals and strategies, and investments into a single, consolidated view. That kind of insight is priceless."

Results: Consolidated View of Infrastructure and Cleaner Data

Since implementing Planview's solution for capability and technology management, the insurance company has:

- Aggregated data in a single system of ownership for every shared property
- Visibility into previously hidden data, and ultimately higher quality data that continues to improve with use
- A "logical configuration management system" that is fast and easy to use
- Insight into over 77,000 relationships, joined by previously unrelated data elements
- Evolved IT from an operations-focused system to a system supporting the Business of IT

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