

Case Study – Leading Global Employer Services Company



Business Process Redesign & Improvement

Implementation Process Improvement

Business Objective & Challenge

Retirement Services organization identified constraints to providing optimum service in the delivery of Health Management Center (HMC) benefits through the full lifecycle management and support cycle. Three key factors in the delivery process were identified as contributing to sub-par service; the organization did not have a complete and comprehensive documentation repository, there was no formal requirements gathering and change management process, and finally there was no universal formal project governance or integrated project management methodology.

Collaborative Solution

The Retirement Services organization engaged Collaborative Consulting to upgrade the HMC documentation to meet completeness, quality and usability best practices; upgrade the requirements definition process for all HMC implementations; and establish a standard project management SDLC methodology.

The Collaborative team led a cross-functional process improvement effort involving the client and a 3rd party vendor that:

- Developed detailed BPMN process maps of implementation processes to identify opportunities to streamline implementation process
- Upgraded product and process documentation and established product knowledgebase
- Implemented project governance standards aimed at providing greater project oversight and accountability
- Established project management approach and SDLC suitable for both client and partner corporate cultures
- Developed requirements management toolkit enabling requirements traceability throughout the project lifecycle

Results

At the conclusion of the initiative, the Retirement Service organization was structure to effectively manage and deliver HMC product to the market place. The new tools and processes reduced the overall implementation time, improved the quality of the process which allowed client expectations to be set accurately contributing to increased client satisfaction, and standardized the project monitoring to allow proactive actions to be taken, as necessary, to successfully deliver HMC product.