

Project Governance Solution At The Speed of Thought

Allied Benefit Systems, United States

CASE STUDY



Key Takeaways



Super-accelerated Delivery Agility



Microsoft API Integration



Cross-system Data Visualization



Enterprise-wide Adoption

Client Summary

Allied Benefit Systems is a national healthcare solutions company. Founded in 1980, they have grown to be the largest, independent third-party insurance administrator in the United States.

They customize self-insurance benefit solutions for their customers (small to medium size companies). These solutions are designed to align their customers' organizational needs and insurance plans that best support their employees' needs.

Project governance is a business process in which new business cases are requested, reviewed, and evaluated in order to determine whether Allied Benefit would like to initiate a project based on the business impact it would have.

This process includes submitting new intakes, requesting multi-level approvals from management based on the projects' size, and going through several rounds of internal reviews before it is approved and registered into its system - Azure DevOps.

Challenges

The project intake and governance process used to be manually performed and managed through spreadsheets and emails, which resulted in:

- Tedious and time-consuming to keep track of project statuses, sending reminders, reports, etc.
- High volume of mundane tasks leading to inevitable human errors.
- Sheer amount of information silos making it difficult and time-consuming to extract data for analysis/decision-making.
- Lack of oversight for managing potential roadblocks like missed deadlines, inefficient resource allocations, breaking budgets, changes in critical path, etc.
- Frequent bottlenecks and delays in project reviews, approvals and initiation process.

Solution

- Deliver a project governance solution that focuses on effective communication, collaboration and iterative development for teams dealing with complex and dynamic projects at Allied Benefit
- Provide a framework that allows Allied Benefit to prioritize and manage projects based on their strategic value, resource requirements, risk factors and align them with business goals
- Integrate with Allied Benefit's existing business system, ensuring the overall project approval, resource allocation, and other governance process are seamlessly automated and consistently maintained across departments

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Capabilities

Leveraging agile methodology, one Mokxa developer single-handedly collaborated with the Allied Benefit teams to develop and deploy the Project Governance Application within 4 weeks. Through small, effective sprints with changing requirements on the fly, the solution provides Allied Benefit with a single source of truth for quick access to project details, progress reports, and other relevant data to ensure an innovative and effective project governance process.

- ✔ Provision of a 360° view on new project intakes that effectively captures key performance indices through executive dashboards, detailed reports, and project timelines. This enables key stakeholders at Allied Benefit to better manage their resources allocations and prioritize initiatives that will add the greatest value to their business.
- ✔ Integrated with the existing ecosystem of technologies and legacy systems like Azure DevOps, Microsoft tools, SQL server, etc in one environment - Joget. This ensures Allied Benefit's users to be seamlessly aligned to their business needs and objectives by providing a unified user experience.
- ✔ Automated processes free up the team to focus on the creative aspects of project management. Built-in business rules, templated forms and consolidated data lists reduced the likelihood of human errors, allowing Allied Benefit to scale with lesser risk and fewer variables.
- ✔ Optimized risk management. The application provides visibility into project risks and issues, proactively triggers any concerns to allow project managers to create contingency plans, mitigate perceived risks, and avoid potential delays/cost overruns.
- ✔ Optimized the review and approval workflow process with audit trail and notifications, allowing various stakeholders, according to their roles, to readily facilitate decision-making and enable timely action.
- ✔ Enabled fusion teams collaboration by standardizing workflows for project approval, criticality assignment, business justification, and other related aspects across both business and IT teams. This ensures that the right people are involved in decision-making, and standardized processes are consistently implemented across projects.

The screenshot displays the Allied Project Governance Application interface. At the top, the Allied logo is visible. Below it, a navigation bar includes links for Portfolio Manager Dashboard, Requester Dashboard, Intake Requests, PFM Review, ADO Configuration, and Configurations. The main dashboard area features several key metrics:

- To Do: 0
- Open Projects: 5
- Unapproved Projects: 0
- Pending IT Estimate: 1
- Completed Today: 0
- Inactive 7+ Days: 232
- All Requests: 235
- Approved on Hold: 1

A 'Project Criticality' section at the bottom right allows users to filter by criticality level (e.g., 10) and show results. On the left, a table provides a summary of project intakes:

ESTIMATED COMPLETION DATE	T-SHIRT SIZE	CRITICALITY	STATUS
2023-02-28	XL(34-55)	High	100%

Below the table, a vertical timeline shows the project's progress through various stages, all marked as 'Completed':

- Started by Requester on 14-02-2023 09:11 PM
- Review Intake Form by Approver on 14-02-2023 09:12 PM
- Approved
- IT Estimate by IT on 14-02-2023 09:14 PM
- Portfolio Manager Review by Portfolio Manager on 14-02-2023 09:15 PM
- Steering Committee Meeting Initial