



VitalityHealth Team Experiences Increased Efficiency, Productivity through Daptiv PPM

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Mohamed Salah, PMO Analyst, VitalityHealth

AT A GLANCE

- VitalityHealth delivers highly innovative products to the substantial market for private medical insurance in the UK, and with increased business traffic and data the company required a mature and efficient portfolio and project planning solution.
- VitalityHealth started researching best of breed PPM options and looked at four PPM vendors initially and eventually decided to move ahead with Daptiv PPM because it addressed all their needs and fit well within their existing business systems and processes.

VitalityHealth is a highly innovative private medical insurance organization in the United Kingdom. The company launched in October 2004 as a joint venture between Discovery Holdings and Prudential plc, in response to a growing need for consumer-directed private medical insurance products in the United Kingdom (UK).

BUSINESS ISSUE—DRIVE COMPANY GROWTH AND AUGMENT FUTURE DEVELOPMENT

VitalityHealth caters to the substantial market for private medical insurance in the UK with increased business traffic and burgeoning data, hence the need for a mature and efficient means for managing projects. Additionally, because the company operates in the heavily regulated Healthcare industry with changing government strategy, policies, and multiple audit requirements, VitalityHealth was in need of dynamic project portfolio management that would help them keep up with changing requirements at the project level without adding excessive time and cost. With these long-term goals in

mind, the company decided to invest in updating its project portfolio software.

VitalityHealth wanted to keep its focus on servicing clients, so rather than dedicating the resources and time that would have been required to build an in-house project management solution, they opted to examine several SaaS-based alternatives. A cross-functional team led by VitalityHealth’s PMO Analyst, Lisa Zettler, led the search and evaluation. The company identified three essential requirements:

1. Real-time reports and dashboards that can be closely aligned to the organization’s business model so they could monitor and measure what truly matters to their business.
2. Smooth and seamless integration with existing business applications so all relevant data could be incorporated as needed.
3. Consistent and accurate capacity planning capabilities across a growing portfolio of projects for improved visibility and management of project



resourcing.

Additionally, it was important to VitalityHealth to work with a PPM technology market leader with proven experience in similar company types and sizes that would understand their needs and prevent them from having to set up the whole project management ecosystem from scratch.

AT A GLANCE

- Daptiv PPM's SaaS technology, hassle free configuration and ease of use impressed VitalityHealth.
- Daptiv PPM's robust reporting and dashboard provided VitalityHealth with better visibility and actionable information for improved decision-making.
- Daptiv PPM's Resource Management allows VitalityHealth to better allocate a growing number of employees across various projects.

SOLUTION—ESTABLISHING A BUSINESS READY PROJECT MANAGEMENT OFFICE

VitalityHealth selected Daptiv PPM by ChangePoint because it offered the best feature set for VitalityHealth's project managers to plan, schedule, and execute projects.

"The fact that Daptiv PPM was SaaS-based, friendly, and configurable was a critical advantage for our business," said PMO Analyst Mohamed Salah. "We started researching PPM options two years back. We short-listed four PPM vendors initially and eventually decided to move ahead with Daptiv PPM, as it addressed all our functional needs and is very adaptable. We didn't have to change the way we work to make it work for us."

After making the decision to go forward, the Daptiv PPM deployment was fully completed within three months. "thanks to the hassle free configuration and ease of use," remarked Salah.

While VitalityHealth mapped out its strategy, Daptiv PPM studied the organization's business and built project management tools that were aligned with the overall business objectives VitalityHealth wanted to accomplish. The

final product was an effective and easy to use PPM solution with customized templates that were built into the existing VitalityHealth systems consistent with the organization's look and feel.

"We needed to use our strategic methodology alongside a flexible PPM tool, and Daptiv PPM absolutely nailed it. The report building capability is tremendous and provides us exactly the business intelligence and visibility we were looking for," Salah added. "Our PMO acts as a link between business and IT, so we understand how an update or change will impact the overall business across teams; hence, we always work closely with IT to implement any change." Realizing the importance of Daptiv PPM adoption, VitalityHealth opted for a phased implementation process. Salah further explains, "The technical brainstorming for the objective of modularity and flexibility helped in the overall implementation process. We did not go full throttle right away, but instead chose to roll out the software in phases – we started with project tools, tasks, and recently added capacity planning to the planning roster."

Daptiv PPM's flexibility to support an iterative rollout enabled VitalityHealth to start and evolve at their own pace based on their business readiness, priorities and needs. Today, Daptiv PPM is being used for all projects across the company, irrespective of size and the Work Intelligence collaboration tools are essential for resource planning and

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“Another great thing about Daptiv [PPM] is that it can be used for all types of projects and dynamic applications can easily be created and deployed in the system to manage work and meet requirements that are highly custom to our business and organization. Daptiv [PPM] helped us configure and generate reports accurately and it’s so efficient that all the complexity of generating the reports is hidden from the users.”

generating professional reports across various teams.

SEEING RESULTS—ELIMINATING GOVERNANCE BY CREATING DYNAMIC APPLICATIONS

Since deploying Daptiv PPM, VitalityHealth has reduced project costs and duration largely due to the efficiencies and streamlining that its project management office (PMO) has been able to accomplish through Daptiv PPM. Additionally, VitalityHealth has gained a high degree of confidence in its project portfolio management and standardization, which is critical to keeping up with an ever-changing business environment and the innovation agenda at VitalityHealth. “Another great thing about Daptiv PPM is that it can be used for all types of projects, and dynamic applications can easily be created and deployed in the system to manage work and meet requirements that are highly custom to our business and organization. Daptiv PPM helped us configure and generate reports accurately and it’s so efficient that all the complexity of generating the reports is hidden from the users,” said Salah.

Salah also remarked that Daptiv PPM’s training process made the implementation smooth, adding, “In my mind, Daptiv PPM has improved stakeholder traction by realizing project benefits efficiently. Productivity has clearly gone up and the business intelligence we’ve gained through better reporting helps us make faster,

better and more informed decisions that enable us to deliver a better experience to our customers.”

In terms of ROI, VitalityHealth now has an enhanced portfolio management process leading to improved decision-making, accountability and scalability for project management initiatives. According to Salah, “It’s easier now to do health checks. We definitely manage cost better as PPM acts as a transparent enabler to identify savings opportunities.”

Today the managers at VitalityHealth use Daptiv PPM to better allocate a growing number of employees across various projects, and provides greater visibility into project status, performance and benefits across the portfolio.

ABOUT CHANGEPOINT

Changepoint provides recognized market leading solutions in both Professional Services Automation (PSA) and Project Portfolio Management (PPM) complete with comprehensive and flexible delivery options that meet the various diverse needs of customers of all sizes, from small installations up to the largest and most complex enterprises. Thousands of enterprises count on Changepoint solutions to drive smarter business decisions, accelerate innovation, and increase efficiencies so they can effectively adapt to today’s rapidly changing economic conditions and competitive dynamics. Changepoint maintains operations in North America, Latin America, EMEA and APAC and services customers across six continents. For more information, visit: www.changepoint.com.

