



Grange Claims and Speed 2 Value

The Right Amount of Agile has Helped us Succeed

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Manager Claims Projects and Business Analysis

COQAA Presentation May 13, 2010



Grange Insurance Companies

Grange Mutual and Integrity Mutual

- P&C and Life
- HQ in Columbus, OH
- \$1.3B Super Regional
- 14 States
- Approx 1400 associates

Claims

- 22 branch offices
- Approx 600 associates

Our Team

- 2 Project Managers
- 3 DPI's
- 2 System Analysts
- 1 Sr Business Analyst
- 7 Developers (varying skill sets)
- 3 QA
- Training and Communication
 - Intranet

Claims System Landscape

- Legacy System
 - Purchased in 2001 (we own source code)
 - Client server application
 - VB6
 - SQL
 - ECM
- SOA
- WebServices Integration
- Vendor Interfaces

Memories.....

Our Prior Planning Method

- Undefined
- Poor communication between business's plans and deployment preparedness
 - Our results did not match their vision
- Informal/Undisciplined prioritization
- No picture of resource capacity
- No historical performance data
- No life cycle schedule
- Adversarial relationship with development

The Good Old Days

Our Prior Deployment Model

- Business Analysis
 - Incomplete Requirements
 - Hole in skill set
 - Defined “how” and not “what”
 - Conditioned Developers and QA to be followers
 - QA unsure of what they would receive
 - Limited to poor validation
- Dev and QA
 - Silo'd efforts
 - No estimates for completion to set expectations

Nightmares

Our Prior Deployment Model

- Dev and QA
 - Size of development unplanned and unmanaged
 - QA unsure of what would be delivered
 - Ad hoc determination of when to stop new development
 - QA process undocumented
 - QA effort unplanned and reactionary
 - No accountability for Dev or QA results
 - ZERO change control
 - Defects and re-work rampant
 - Major misses in unit testing and QA testing
 - Dev and QA credibility severely impacted

Introduction of Pillar's Speed 2 Value

- Contract with Pillar Technology
- Dedicated Project Team
- One platform
- One Code Source
- Learn S2V cadence
- Mentor Project Managers
- Continuous Integration Testing
- Automated Testing

Speed 2 Value *Cadence*

- Daily Scrum
- Commitments (Weekly Releases)
- User Acceptance Testing
- Change Control and Prioritization
- Status Updates

Speed 2 Value:

SCRUM!

- 15 minute daily meeting
- What did you do yesterday?
- What will you do today?
- What is standing in your way?

Speed 2 Value: Commitments

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- Weekly Assessment of Developer/QA 'Velocity'
- Pending tasks equal velocity (80% new dev and 20% change)
- Project Tasks Broken Down to the Day

Value Story	User Story / Use Case	Task	Planned Start Dat	Status	Original Effort	Last Re-estima	ETC	Completed	Skillset	Owner	Origin
Locate Claims Offices	UC-14 View Claims Offices Location Results	Add fields to CHIP database table	7/23/2007	Pending	0.50	0.50	0.50	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Search Claim Office Input Class	7/23/2007	Pending	0.25	0.25	0.25	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Search Claim Office Result Class	7/23/2007	Pending	0.25	0.25	0.25	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Search Claim Office WS Method	7/23/2007	Pending	0.25	0.25	0.25	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Search Claim Office Method in BT	7/23/2007	Pending	0.25	0.25	0.25	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Search Claim Office Method in DT	7/23/2007	Pending	0.25	0.25	0.25	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Secure Search Claim Office WS Method	7/23/2007	Pending	0.25	0.25	0.25	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Create Search Claim Office Stored Proc	7/23/2007	Pending	0.50	0.50	0.50	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Create Result Page	7/23/2007	Pending	0.25	0.25	0.25	0.00	Developer	Coley	New Requirement
Locate Claims Offices	UC-14 View Claims Offices Location Results	Load results into DataGrid	7/23/2007	Pending	0.25	0.25	0.25	0.00	Developer	Coley	New Requirement

Speed 2 Value: *Change*

- All change is documented
 - New Requirement
 - Requirement Clarification
 - Defect
 - Re-estimation
- Change Requests are approved, prioritized and ranked
- 25% Buffer

Speed 2 Value:

User Collaboration is Key!

Use Case Validation

IT Development

Weekly Builds

User Acceptance Test

Change
Prioritization

Commitment
Meetings

Status Meeting



Speed 2 Value: *Status*

- Bi-Weekly Updates
- Communicate what has occurred in the project
- Visual representation of project progress
- Opportunity to identify problems and risks
- Shows Change Impact and Scope Creep

Benefits from 1st Project

- Greater Collaboration between Business & IT & QA
- Quicker Delivery of Business Value (6-8 wks)
- Wide Open Communication – Everyone knows what is happening and when
- Better Prepared for Change
- Lower Likelihood of Defects & Delays
- Substantially Improved Accountabilities
- Deployment is Better Aligned with Business
- Feeling of Team Accomplishment

Applying to a Larger Portfolio

- Standardized and Gated Process
- Business Analysis
 - Business Value
 - Value Stories
 - Use Cases
- High Level Estimates
- Track Record (Common Language)
- Prioritization from Resource Capacity Bucket
- S2V Agile Project Management



Claims Initiatives

Prioritization

- Claims Leadership Team
- Decisions Made by Business
- Debate Priority Order
- Confirm Business Value
- Everyone understands what is to be worked and what is shelved



Leadership Prioritization

Roadmap of Business Plan

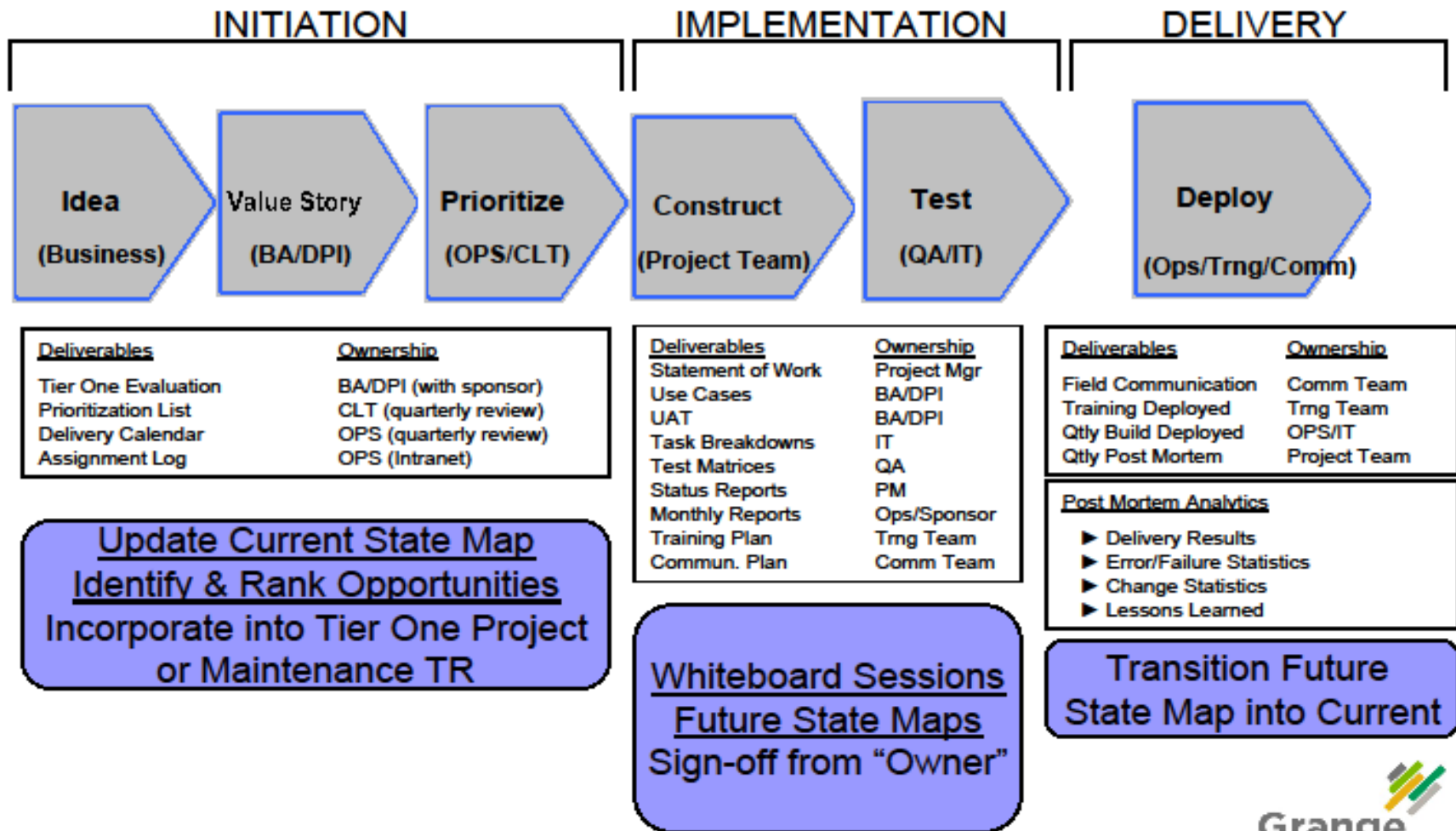
Project Title	Owner	PM	Q1_2010	Q2_2010	Q3_2010	Q4_2010	Q1_2011	Q2_2011
1. CHIP Archive/Purge	Dave	Beth	TR1996 (18/9)					
	Slavik	Rickard						
2. Medicare Compliance		Jeff	TR1775 (45/10)					
		Stenerson	TR2012 (6/2)					
3. Total Loss/ Salvage Process	Jason	Jeff	TR1616 (10/10)	TR1952 (3/4)	TR1873 (20/8)	TR1957 (3/6)		
	Manns	Stenerson	TR1954 (4/4)	TR1323 (20/7)	TR1967 (8/7)			
			TR1875 (1/4)					
			TR1329 (3/3)					
			TR2016 (4/7)					
			TR1968 (8/3)					
4. Medical Bill Processing/Tracking	Jim Van Farowe	Beth	TR1882 (10/7)	TR1956 (12/6)	TR1961 (20/10)	TR1963 (16/7)		
		Rickard	TR1891 (2/2)	TR1959 (15/5)	TR1962 (3/3)			
					TR2004 (1/15)			
5. Rental Workflow Automation	Jason	Jeff		TR1994 (12/10)	TR1964 (5/5)			
	Manns	Stenerson		TR1966 (16/5)				

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Release Schedule

- All Claims Initiatives, Projects and Development follow a Quarterly Release Schedule that is managed by one PM
 - June 15
 - Sept 15
 - Dec 15
 - March 15
- Business is intimately involved but no longer manages the process

Extending Process Improvement



Resources “Bucket”

- Capacity Planning
 - Agreed Upon Language – ideal days
 - Velocity Based on **Actual** Historical Data

TOTAL iDAYS AVAILABLE	220.00	110.00
TOTAL ESTIMATED iDAYS	214.75	145.50
25% Buffer	55.00	27.50
TOTAL AVAILABLE iDAYS AFTER BUFFER	165.00	82.50
REMAINING AVAILABLE	(49.75)	(63.00)

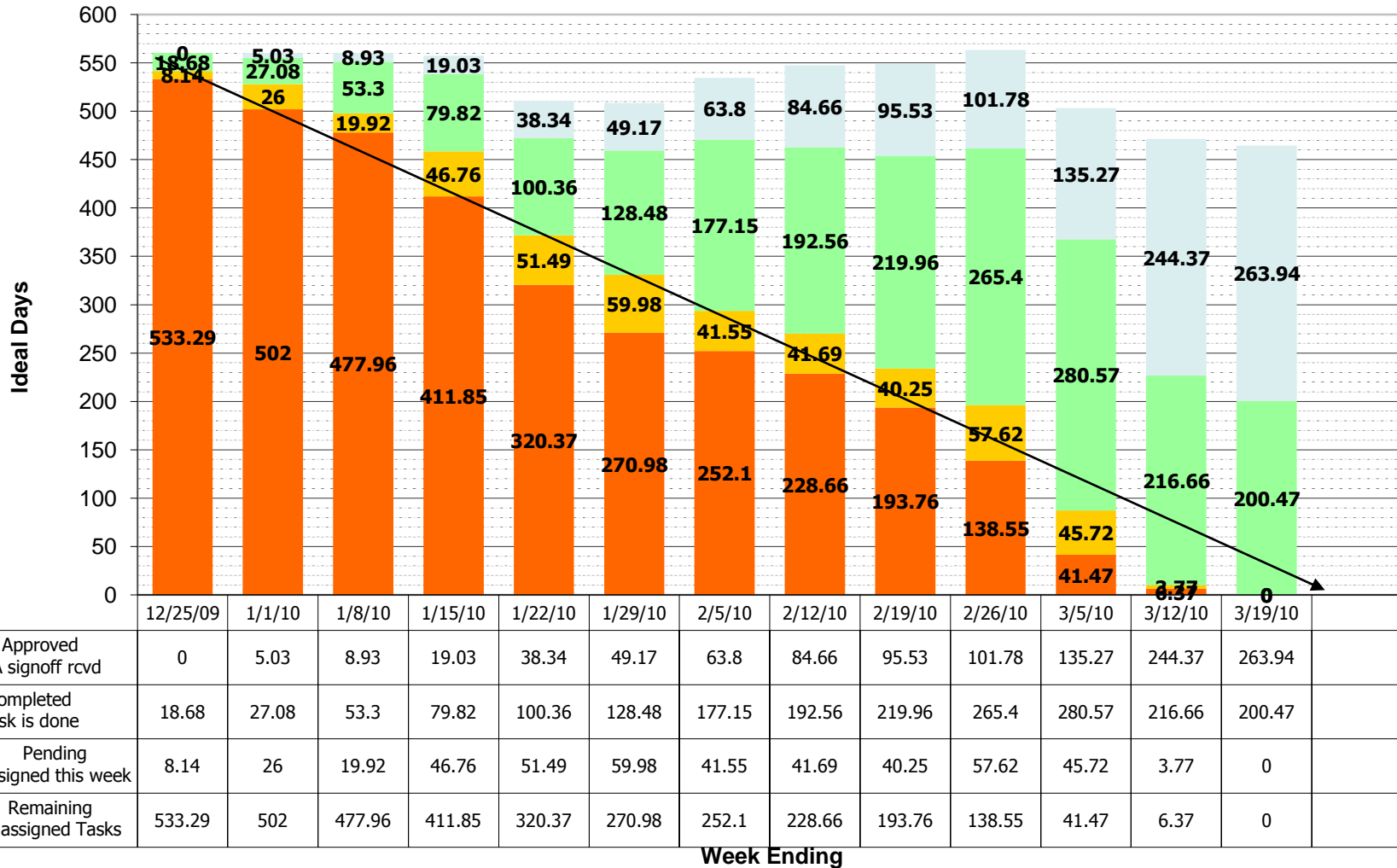
- 70% for Tier 1
- 20% for Maintenance
- 10% for Products and Mandatory

Experience

- Volatility of Release is Gone
- Estimate and Performance Baselines
- Analysis and Improvement of Estimating
- Planning Tools
- Transparency
- Greater Business Understanding of Dev and QA
- Implementation Team Sitting at the Business Table
- Discussions and Ideas that Never Happened Before
- Vastly Improved Business Analysis

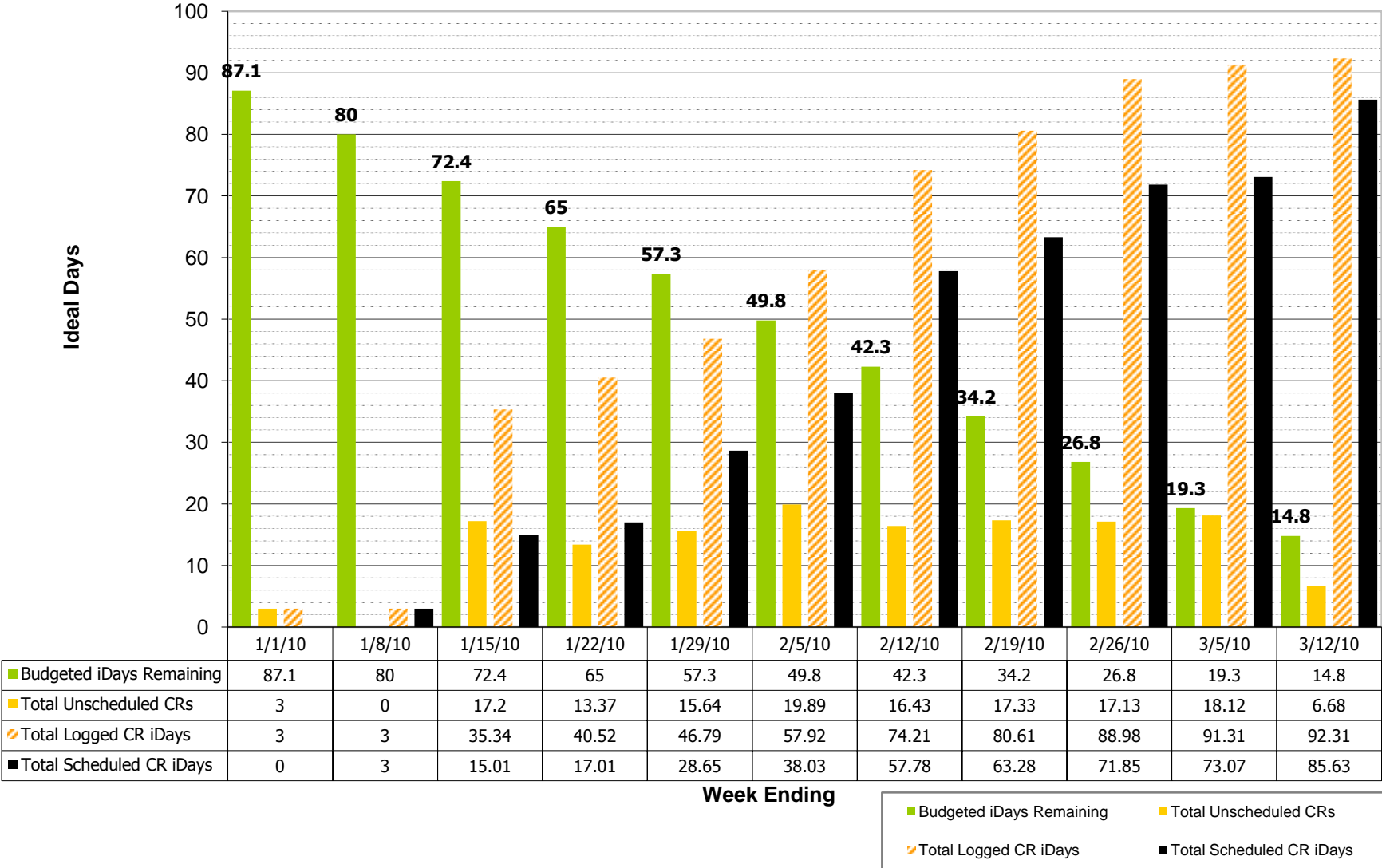
Example: Performance

Overall Project BVC



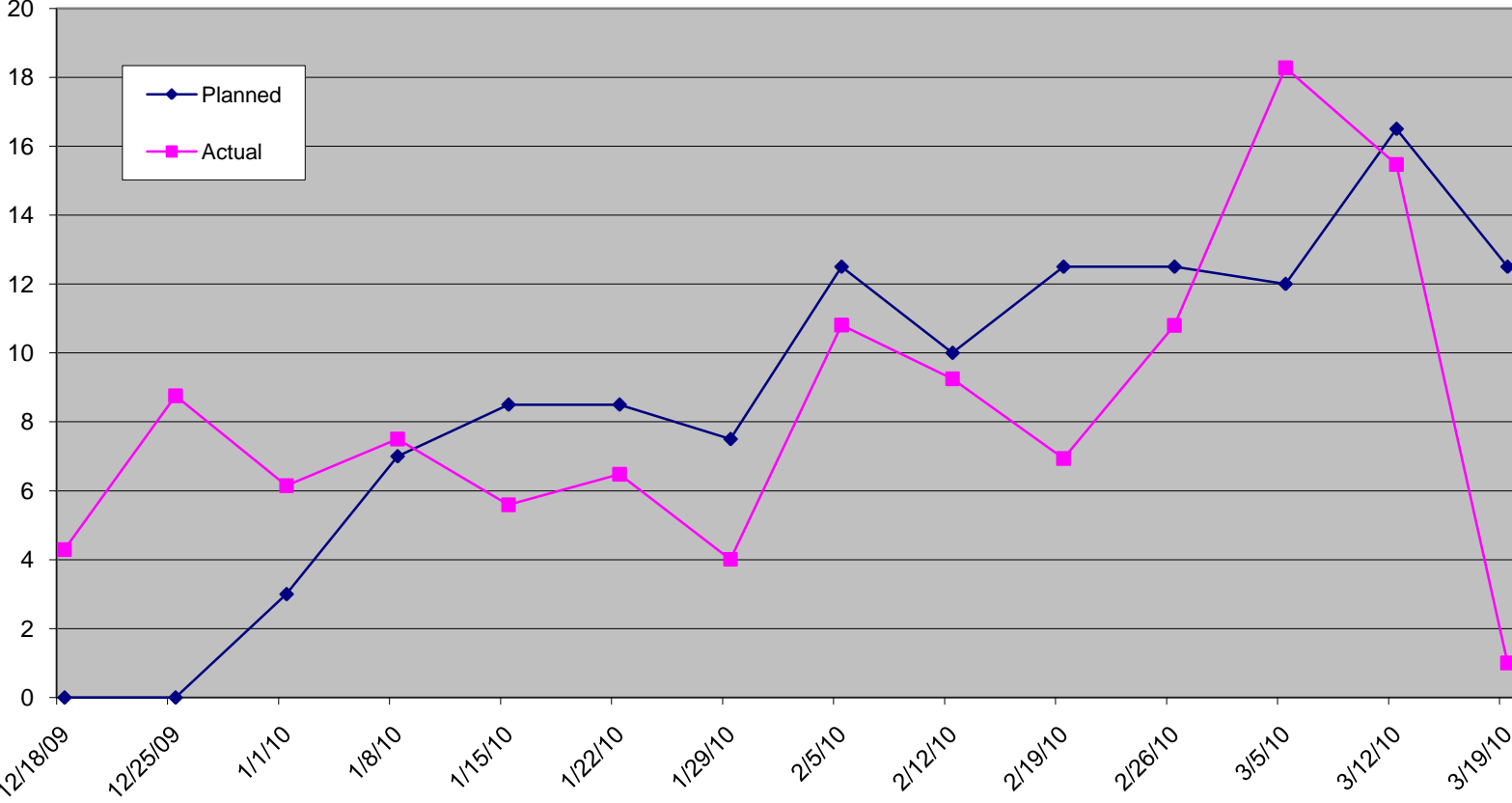
Example: Change Management

Change Buffer Burndown



Example: Velocity Analysis

Q1 QA Velocity



Example: Task Breakdown and Tracking

Value Story	User Story	TID	Task	Planned Start Date	Planned Complete Date	Actual Complete Date	Status	Original Estimate (iDays)	Last Re-estimate	Estimated Time to Complete	Completed	Skills et	Owner	Origin
VS-03 AMD / Property	1968-Total Loss Triage Tool	438	Create Matrix	1/18/2010	1/22/2010	12/18/2009	Approved	0.13	0.13	0.00	0.13	QAT	Jeff Tayama	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	453	Update matrix & task breakdowns	1/18/2010	1/22/2010	12/25/2009	Approved	0.13	0.13	0.00	0.13	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	439	Task Breakdowns	1/18/2010	1/22/2010	12/18/2009	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	1251	Update matrix & task breakdowns - UC01	1/18/2010	1/22/2010	2/5/2010	Approved	0.13	0.13	0.00	0.13	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	440	System determines vehicle to be Repairable	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	441	System determines vehicle to be a Total Loss	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	442	User wants to UPDATE the info on the AMD Total Loss Triage screen	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	443	The vehicle is a Total Loss and Non-Drivable	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	444	Key Words	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	445	Leaving without saving	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	446	UI Fields & Navigation /Controls	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	447	Business Rules	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	454	Questions & Point Values	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	455	Reporting	2/8/2010	2/12/2010	3/5/2010	Approved	0.25	0.25	0.00	0.25	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	456	Functionality	2/8/2010	2/12/2010	3/5/2010	Approved	0.13	0.13	0.00	0.13	QAT	Deb Roush	Original Task
VS-03 AMD / Property	1968-Total Loss Triage Tool	1464	CR059-Place a link to the preferred shop look up on the screen. See use case for additional info.	2/22/2010	2/26/2010	3/5/2010	Approved	0.13	0.13	0.00	0.13	QAT	Deb Roush	New Requirement
VS-03 AMD / Property	1968-Total Loss Triage Tool	1467	CR060-Additional hover feature with preferred shop scripting. See use case for additional info.	2/22/2010	2/26/2010	3/5/2010	Approved	0.13	0.13	0.00	0.13	QAT	Deb Roush	New Requirement
VS-03 AMD / Property	1968-Total Loss Triage Tool	1618	CR075- QA Tasks	3/3/2010	3/12/2010	3/12/2010	Approved	0.13	0.13	0.00	0.13	QAT	Deb Roush	Requirement Clarification

What Next?

- Map our Process for Opportunities
- Develop/Document Best Practices
- Continue to Train and Professionalize our BA's
- Focus on Enhancing our Skills and Tools for QA
- Adapt to changes and feedback from our Associates
- Avoid Creating a Bureaucracy
- Better Manage Customer Expectations
 - Better Planning/Estimating
 - Improved Communication with Greater Transparency
- Velocity and Estimating Reviews
- Introduce to the Enterprise

Questions?