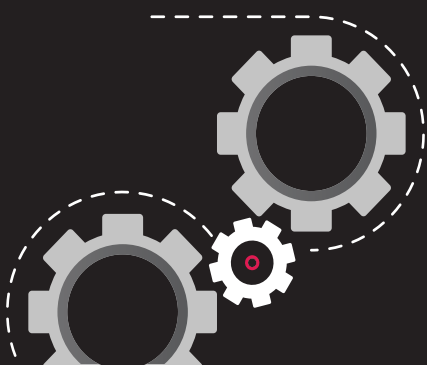




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Insuring Agile:
A SAFe Transformation at a Global
Commercial P&C Solutions Provider
Case Study
Insurance Company



Case Study

Insurance Company

Company Details

Industry: Insurance

Company Size: 5,800 Employees

Location: United States

Products: Customized Business Insurance, Business and Professional Services, Risk Control

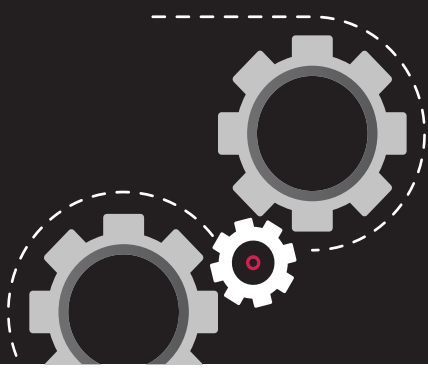
Cprime Services: Agile Transformation, Agile Team Training, SAFe Transformation

The Problem: The commercial casualty and property insurance sector is highly dynamic. Influenced by external factors, including strict domestic and international regulation, changing market requirements, and long- and short-term business cycles, this global commercial insurance provider turned to Cprime to transform processes and improve its competitive edge.

Overview

A mainstay in the commercial insurance industry, this company's early accomplishments heralded a long-standing reputation for innovation.

They continue to break new ground by exploring new customer segments in the commercial realm and expanding their global digital presence. The U.S.-based commercial insurer also provides services for businesses and professionals in Canada, Europe, and Asia.



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Aligning Business Goals with Technical Investment

No industry exists in a vacuum, but the commercial casualty and property insurance sector is particularly dynamic. Influenced by myriad external factors, including strict domestic and international regulation, changing market requirements, and long- and short-term business cycles, the company wanted to increase its competitive edge. “Management was seeing the inconsistent delivery of technology to support its platforms and products,” explains Cprime Principal Consultant Daniel Gilio, who was the Delivery Manager for this engagement. “They wanted to maximize their spending and better understand the effect of changes on overall value and technical quality.”

Under the waterfall

In particular, the company was looking to move away from a traditional waterfall way of working toward a more product-oriented and, eventually, a portfolio-level approach. Despite their commitment to advancement, “They recognized their project-oriented way of working was holding their technology platforms back—everything worked, but the company wanted them to be state-of-the-art,” says Gilio. “They needed visibility into the work to ensure that once something hit production, it met expectations and tied business objectives to technical investment.”

Turning on a dime

Finally, the company sought more flexibility in approaching their product and technical development. Longer fixed development schedules affected the insurer’s ability to rapidly introduce or adapt its products. “Management needed the ability to quickly pivot, repurpose, and rescope to address changing business conditions,” Gilio says.

The Solution: Covering all the Bases with Cprime

The insurer approached Cprime for several reasons. First, “the Cprime flywheel approach—the way we holistically implement mutually reinforcing strategies to effect progressive change—was attractive to the company,” says Gilio. “Next came our experience in not only scaled agile but in agile tooling and product agility.”

Finally, the company was aware of Cprime’s reputation for success with enterprise clients in the global commercial P&C space. “They knew we could leverage best practices and had customizable assets built up out of prior engagements to help them more easily achieve their transformation goals,” says Gilio. “We had a robust starting point to sit down with our executive sponsors and design training relevant to their business.”



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Working toward goals—rapidly adapting to requirements

Although the Cprime brief ultimately focused on migrating the company toward SAFe processes, the team broke the initial transformation efforts into more digestible, non-disruptive segments. “The company knew moving straight to SAFe was too big of a lift, so we began training in agile and scrum to get some smaller successes under their belt—to get them comfortable with the mechanics of working with SAFe at the portfolio level,” explains Gilio.

Moving incrementally toward transformation, Cprime established an agile center of excellence comprised of a dozen company leaders. From there, the two-person team trained product owners and product managers, helping the insurer create high-level, in-house scrum masters. As the group grew to five, “Cprime provided training and workshops to over 400 people within the organization,” says Gilio. “We designed just-in-time training and workshops that ranged from SAFe-team sessions of around 30 people to product-owner workshops with as few as 5 or 6 attendees.”

“We don’t train for the sake of training—with Cprime, there is always a practical takeaway rather than just a certification that gets the client no closer to its goal.”

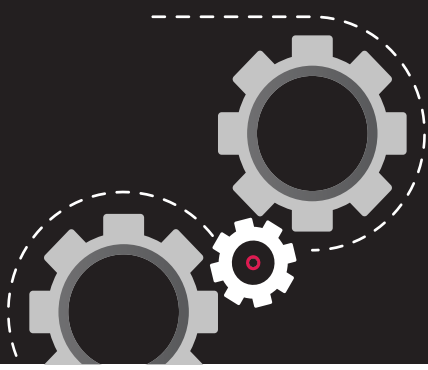
- Daniel Gilio, Cprime Delivery Manager

Providing skills, not badges

Cprime focused on on-the-ground, functional coaching to get the insurer’s teams ready for successful transformation. “We don’t train for the sake of training—we do workshops with live assets,” Gilio says. “By the time we finish mentoring a two-hour session, they have something useful like user stories that are part of their backlog or are sized for scrum planning poker. There is always a practical takeaway, not just a hollow certification that gets the client no closer to the goal of launching an agile release train.”

The advantages of a well-rounded partner

During this timeframe, the company was transitioning from Version One to Jira to manage Scrum assets. “The company didn’t explicitly engage us to support their Jira migration,” says Gilio, “but, because of our deep knowledge of agile, Atlassian, and the mechanics of implementing Jira, our coaches were on hand to help. The wide scope of Cprime’s experience ended up providing unexpected benefits.”



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The company utilized Cprime's expertise in aligning the practical Coaching with the alignment of Jira as the mechanism to manage Scrum team-level ceremonies. Cprime provided targeted training for ScrumMasters, Product Owners, and Teams aligned with the implemented Agile best practices.

In addition to training, Cprime provided additional expertise as needed.

The Results: Transforming Scope, Schedule, and Budget

Cprime began training the insurer's teams in 2019. "Our initial outcomes were the change to scrum and moving the company away from a traditional PMO (project management office) perspective," says Gilio. "The company was thrilled to be operating within the iron triangle of scope, schedule, and budget, but it is just getting started."

The insurer went from waterfall to scrum and then took those scrum learnings to SAFe. "The company successfully moved their digital transformation forward by staying within the agile guardrails," says Gilio. "Now they have five agile release trains and are about to launch their sixth. They can quickly alter the scope or reprioritize when they need to." The changes have had a significant impact on planning and seeing quality results.

Clear priorities

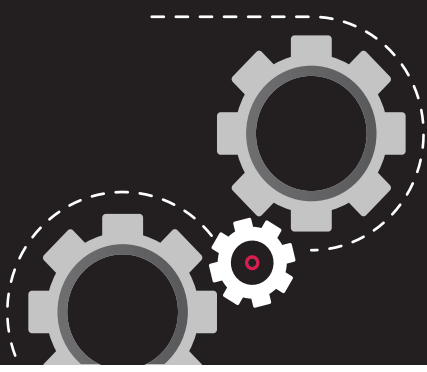
"With SAFe in place, management can now ask and answer questions like 'Does this initiative help with risk reduction or opportunity enablement, how long will it take, how much will it cost, and how will it affect the business?'" says Gilio. "As a result, they can recognize and prioritize smaller but more strategic and higher ROI jobs over projects that might take an additional sixteen months to generate the same amount of revenue."

A quick pivot

In one instance, this newfound agility allowed the insurer to pivot to make rapid adjustments to specific products and tech platforms in the face of COVID 19 rather than removing them from the marketplace or compromising on their quality. "They used SAFe principles to define and prioritize that work using empirical data and lean budget principles," states Gilio.

Future Stops for the Agile Release Train

Despite the scope of the changes, the transformation is far from complete. "With the foundation in place, the company is scaling up and launching more release trains," says Gilio. "Our sponsors are moving to adopt more SAFe-based techniques at the portfolio level and have renewed with Cprime to achieve that in 2022."



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Featured Team Member



Daniel Gilio

Principal Consultant, Cprime

Since 1998, Dan Gilio has specialized in enabling Software Development organizations to achieve a new level of success in a variety of highly competitive industries. Dan has extensive consulting experiences in software configuration and change management, requirements management, test automation and software compliance technologies. In addition, he has many years of experience advocating for software development process enhancements within client organizations. Stressing the criticality of people, process, and tools, Dan has overseen transformations from entrenched process to more Agile counterparts.

About Cprime



Cprime is an industry-leading, full-service global consulting firm with a focus on providing integrated and innovative solutions around digital transformation, product, cloud, and technology. With over 20 years' experience, we provide strategic and technical expertise to businesses across more than 50 industries. Our team of advisors and technical experts have the know-how to meet organizations where they are to develop actionable solutions and solve business challenges. We also collaborate with our expansive network of partners to design, deploy, and harmonize technology stacks across organizations. Our mission is to empower visionary business leaders and teams to reimagine the future of work to achieve better outcomes.