



# Helvetia Leverages Tempus Resource to Achieve Data Transparency & Clear Bottlenecks

Helvetia is the leading all-lines insurer in Switzerland. For more than 160 years, Helvetia has also been an established presence in other European countries such as Germany, Austria, France, Italy, and Spain. In the Specialty Markets segment, the company offers bespoke insurance solutions and reinsurance in selected niches worldwide.

The company's insurance solutions cover the full spectrum of products for private individuals and businesses. As well as running its own sales organizations and direct sales, Helvetia cooperates with networks and partners such as brokers and banks, accompanying customers throughout the entire cycle of their lives and needs.

Offering their customers simple solutions to complex and individual insurance needs, Helvetia follows a straight-forward motto, "Simple. Clear. Helvetia."

When looking for a Project Portfolio Management (PPM) solution, the company wanted a simple tool that would help with the prioritization process and offer a high level of transparency.

## The Challenges of Managing a Large Project Portfolio

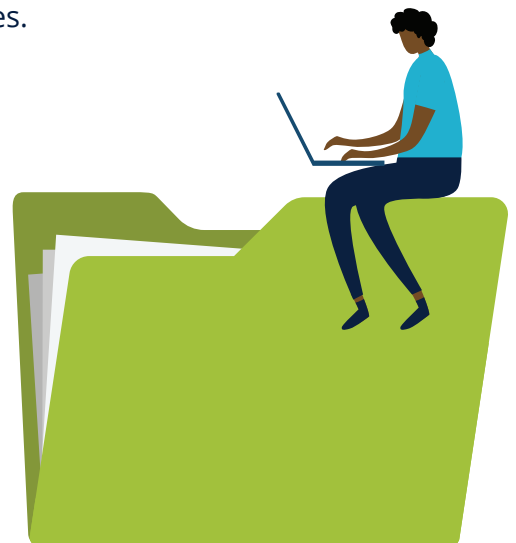
Helvetia had a large and diverse collection of 256 projects in their worldwide portfolio. With roughly 120 projects running in parallel in the implementation phase, the company also had 56 projects backlogged in the startup phase and 51 projects in the planning phase.

"With such a large portfolio came a lot of challenges," shares project portfolio manager Tim Ruprecht. "It's quite a task keeping up with each project. Resource conflicts within the portfolio are guaranteed because of the number of projects. This was especially a challenge for our IT department because almost all of the projects involved that department in some form."

Additionally, resource dependencies within the portfolio were often not clear. This was a problem because those dependencies had a huge impact on project deliverables.

## Choosing Tempus Resource

Helvetia selected Tempus Resource as the solution to their project portfolio management problem for two reasons. Tempus Resource gave them the visibility they needed to understand where the resource constraints were occurring (specifically which projects). It also provided them with the ability to track all their projects in one tool and easily produce reports that management found valuable. "Tempus Resource is exactly what we needed," confesses Tim. "We can identify resource conflicts before they happen, and we can provide the data for prioritization if it's required. Also, we can view resource dependencies with regard to specific teams or bottlenecked resources".



## Combating the Challenges of an unwieldy Portfolio by Creating New Roles to Manage the PPM Process

With Tempus Resource in place, Helvetia set out to combat its portfolio challenges. “First, we implemented roles we knew we’d need to manage the new process,” explains Tim. “Roles were really key because we communicated clear responsibilities for each role, and everybody knew what their task was.”

The first role Helvetia established was the resource manager (RM) role. The RMs are responsible for assigning resources to the “operative tasks” required to complete the work planned in the portfolio. They were also to be responsible for displaying the portfolio capacity of the team, processing the resource requests, and talking with the project managers.

The second role they established with regard to the process were the project managers. The project managers would be responsible for planning their project in terms of human and financial resources. As the project progressed, the project managers were also asked to communicate any changes they made to their resource plan or their financial plan changes to the Project Portfolio Management (PPM) committee because, to quote Tim, “with the size of Helvetia’s portfolio, even small changes often have a great impact on budgets.”

*“Tempus Resource is exactly what we needed. We can identify resource conflicts before they happen, and we can provide the data for prioritization if it’s required. Also, we can view resource dependencies on specific teams or bottlenecked resources”*

*-Tim Ruprecht, Helvetia*



The third role in the Portfolio Management Process was the PPM management function. The original hope was that having an additional level of management as an escalation point would help the PM’s and the RM’s keep everything on track

The hope was that the existence of this governance body would allow Resource Managers to make resource conflicts transparent. When resource managers see conflicts with projects, they first reach out to the project managers to find a solution. This is the first level of escalation. If they do not find a solution, the second level of escalation is the PPM.

The task of PPM management was to provide transparency across the portfolio and resolve resource conflicts with the resource managers and project managers when possible. “If it’s not possible, Helvetia created a third level of escalation, Project Portfolio Board, which we called the conflict committee,” explains Tim. “The Project Portfolio Board is made up of PPM management and top management. Together, they are ultimately responsible for resolving resource, financial, and personnel conflicts.”

## Implementing a Process for Planning

Helvetia follows a rolling 3-month planning process for projects. This means that project managers must plan their projects each month for the next three months. This involves project managers updating their project plan and resource managers updating their assignment plans and displaying their change capacity within Tempus Resource.

“That level of planning gives the PPM committee and Project Portfolio Board the capability to analyze, simulate (using What-if functionality), and decide whether another project can be put into the portfolio,” says Tim. “That planning also highlights any resource conflicts on the horizon. This was a big change for our organization because before, when we were using Excel, and only the initial project planning was available.”

## Implementing Tempus Resources - an exercise in finding the “WIIFM.”

During the implementation process, the resource managers were asked to provide data to PPM management. The resource managers did this faithfully with the hope of getting back some suggestions about prioritization. Unfortunately, this didn't happen at the start. They complained about this. So, Tim had to find a way for resource managers to easily plan their resource allocation without being forced to decide which project got resources and which one didn't. The issue was that with the initial process if the resource managers didn't make these decisions, their resources would become over-allocated, and this was unacceptable. Again, the Project Portfolio Board was the answer.

“Having resource managers handle prioritization is not always in the best interests of the organization,” says Tim. “So, with the implementation of the Project Portfolio Board, we gave the resource managers a tool to escalate their resource conflicts and protect their people from over-utilization. That was a key part in the acceptance of Tempus Resource.”

But the resource managers were not the only ones with complaints about the process requirement that accompanied the Tempus resource implementation. The project managers weren't happy because the new process meant that they had to update their project plan every quarter. Before, they only had to plan the project once a year, and the resources were set for that year. “Now it's different with Tempus Resource,” explains Tim. “That meant we needed to find a benefit for the project managers.”

As with the resource managers, Tim had to find a way to achieve maximum stakeholder buy-in. The first step was to make all the data necessary for project managers (net and change capacities, resources, and project information) available in one tool. That was a big benefit for project managers because, before Tempus Resource, they had to go into SAP to look at project costs and Jira to look at time-tracking data.

The second step was for project managers to have committed resources. If a resource request for personnel goes through the approval process within Tempus Resource, the project manager is guaranteed to have the approved personnel on their project. “It's not like before when things would shift, and project managers would lose personnel,” says Tim. “Now, project managers have a solid resource commitment so that their projects can flow more consistently.” Once the PPM process was completed, Helvetia could move on to tracking KPIs

## Ease of KPI Tracking

Helvetia used Tempus Resources to provide easy-to-read dashboards that track four important KPIs:



Resource Request Approval for the Line – This KPI gives an indication of how much the resource managers are working on their resource requests.



Resource Request Approval for Projects – This KPI shows whether project managers are working on their resource requests and are communicating with resource managers.



Plan Versus Actuals – This KPI tracks whether people are working on the tasks that are planned or tasks that are not planned.



Unplanned Actual Hours Ratio – This KPI gives an indication of whether the project manager is actualizing their planning for their project.

“All KPI reports are created monthly and distributed to stakeholders,” explains Tim. “One of the ways we use these reports is to get resource managers and project managers to continually improve the data quality.”



## The Benefits of Using Tempus Resource

One of the primary benefits of using Tempus Resource is that project managers can track time data and project costs within one tool. Every project manager has a view of their plan and actuals. Their plan can be easily adjusted within Tempus Resource, and they can compare their project budget to the actual data.

Additionally, the project requirements for each team are now transparent for resource managers. "In the past, it was difficult for all the resource managers to have transparency with all the requests that were coming from different projects," recalls Tim. "Now, it's easy to see what a project wants from a particular team."

Workload transparency is another benefit. Tempus Resource empowers resource managers to see whether people are over-utilized. If that is the case, they can easily adjust their planning process for their team. And, they have a tool to escalate resource conflicts directly via PPM management to resolve bottlenecks.

*"In the past, it was difficult for all the resource managers to have transparency with all the requests that were coming from different projects. Now, it's easy to see what a project wants from a particular team."*

*-Tim Ruprecht, Helvetia*

There are benefits for PPM management as well. PPM management achieves better overall project tracking and monitoring. And, PPM management has better financial forecasting and better tracking of strategic budgets.

"Finally, Tempus Resource has helped Helvetia with the prioritization process," concludes Tim. "Now, it is easier for management to make confident decisions because the data is more reliable."

