

Direct Insurer Successfully Manages IT Projects with PLANTA project

In the past, ERGO Direkt Versicherungen planned all its IT projects with Excel and with an individual solution based on Lotus Notes. This solution has now been replaced by PLANTA project. The introduction of this professional project management tool allows a close interrelationship between single project management and portfolio management.

ERGO Direkt

Initial Situation

Prior to introducing PLANTA's multi project management solution, single project and portfolio planning were mainly carried out manually. The available tools only covered a part of the required task scope. In addition, there was little transparency with respect to changes during the quarter.

Implementation Process

An internal competence team with representatives from IT, IT coordination and actuarial services defined the required targets for project and portfolio management. The objective of the implementation was to enhance the project and portfolio management, resource planning, work reporting for employees as well as to replace former individual solutions. Initially, the market for project management software was researched, this was then followed by an intensive review of the shortlist candidates which included on-site presentations by the four remaining suppliers. From the short-list one candidate was chosen, PLANTA project, for the following reasons:

- Usability
- Cost/benefit relation (license costs and implementation effort)
- Resource planning and work reporting
- Project ranking according to business strategy
- Availability of all relevant roles (employee, project manager, team manager, portfolio manager)
- Incorporation of vacation and basic load in establishing resource availability
- Good understanding of ERGO Direkt's requirements

Process Optimization

Since May 2012, PLANTA project and PLANTA portfolio are being used in practice in the IT, IT coordination and actuarial services departments. Activity reporting is also carried out by employees from other departments in PLANTA. Data from SAP (organizational structure including employees) and Jira (project master data) is imported into PLANTA via interfaces. At our office in Nuremberg/

Fürth, between 30 and 50 project and subproject managers, two portfolio managers, 300 to 500 project team members, around 20 resource managers, 10 to 20 managers/stakeholders as well as approximately 10 accountants are working daily with the system. About 50 proposals with an individual effort of more than 15 person days each are planned simultaneously. ERGO Direkt quarterly decides which projects will be realized using skill-based portfolio planning and a ranking based on the business strategy. PLANTA project allows the impacts (e.g. resource bottlenecks) on individual teams and fields of expertise to be easily detected, and avoiding action to be taken early.

„Since implementing PLANTA project, we have a common and daily updated database for all projects, plans and reports. This is crucial for us and facilitates the cooperation of involved roles.“

Dr. Stefan Spieck, ERGO Direkt

Versicherungen - Head of Customer Management (IT Coordination)

Experiences

Since its implementation, the PLANTA system has helped to solve the following problems:

1. Both single projects and portfolio management, access the same database. Project managers do not have to submit any data for portfolio planning anymore.
2. The Excel sheets that were constantly sent back and forth were abolished.
3. Reports in PLANTA now provide all the information that is necessary for decision making.
4. ERGO Direkt now has a real time view of the current project and portfolio progress available at the click of a button.
5. If problems do occur, then ERGO is able to take avoiding measures much earlier.
6. Today, ERGO's project managers receive much better assistance than they did in the past. The work reporting of employees has become easier and faster, and the satisfaction with the tool support has increased significantly.