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SUMMARY

From October 2013 to March 2014, RefineM worked with a national insurance firm to get a troubled project back on track. The firm was developing an in-house solution to avoid renewing a contract with a vendor, but key milestones were being missed and the vision of the project wasn't clear. RefineM was brought in to establish reporting and metrics and recommend corrective action to recover the project. RefineM devised an alternative solution that saved the firm millions of dollars and accomplished their goal of avoiding renewing the vendor contract.

CHALLENGES

The insurance firm's primary challenge was schedule slippage, which was compounded by ambiguity about project status due to ineffective communication. The insurance firm's project manager lacked the expertise to manage vendor relationships effectively. When key deliverables didn't meet expectations, the PM wasn't able to hold the vendor accountable and ensure the project kept progressing. In addition, important parts of the project, including gathering requirements, took longer due to a lack of experienced resources on the vendor side.

Communication between the insurance firm and the vendor was also difficult due to geographic distribution across several different time zones.

SOLUTION

RefineM's consultant quickly built relationships with the vendor to get everyone on the same page and improve communication between the disparate client and vendor sites. He collaborated with client PMs and vendor team members to identify the key risks in the project and determine how they could be mitigated. Implementing defect tracking and daily status reporting helped the RefineM consultant quickly determine the state of the project. It became clear that the planned deadlines weren't feasible, and RefineM collaborated with the insurance firm to implement an alternative solution that allowed them to meet their goals and avoid renewing the contract.

OUTCOME

Upon completion of the project, the client reported, "[RefineM's consultant] has a body of knowledge, experience, and processes that he applies succinctly. He cuts through things." Thanks to RefineM, the client was able to devise an alternate solution that allowed them to save over one million dollars and achieve their goals. They were satisfied with the work RefineM had done and felt empowered to implement projects successfully in the future.