Claims Management Company Successfully Completes Massive M&A Initiative Using Best-Practice Project and Program Management

**The company grew dramatically by successfully integrating more than 10,000 new customers, opening two additional call centers, and doubling the number of claims serviced — while meeting program deadlines, contractual obligations, and increasing revenues by over 30%.**

**Company**

A leading North American provider for claims and productivity management solutions, the client delivers claims, productivity, managed care, risk consulting, and other services to clients located in the United States and Canada. The company specializes in workers’ compensation; disability, FMLA, and other employee absence; managed care; general, automobile, and professional liability; warranty and credit card claims services; fraud and investigation; structured settlements; and Medicare-compliance solutions.

**Challenge**

The company was in the midst of significant business expansion that included acquisition of five organizations simultaneously. One acquisition, which required integration of 26 separate client companies and a software development effort designed to migrate these companies to the client’s corporate standards and best practices, was in need of a mid-course correction. The project was behind schedule and over budget at the mid-point of the implementation. Remaining on this track would have resulted in the loss of critical clients and associated revenue, along with a significantly reduced return on investment for the acquisition and development program.

At the same time, the company had taken on a new implementation of disability and leave solutions for a leading global retailer. The addition of this client was projected to double this business unit’s annual volume for the company and required bringing two new call centers online to support the added volume.

In the midst of this transformative growth, senior management wanted to improve overall project management through better monitoring, control, and reporting while ensuring critical deliverables and targets were met.

**Solution**

The company partnered with PM Solutions to provide project management and consulting. After assessing the health of the various programs, PM Solutions made several key recommendations and supported the delivery of these initiatives on several fronts:

* For the major acquisition, the project team consolidated all decision-making responsibility with the project sponsor, appointed a technology champion, and improved the understanding of roles and responsibilities by developing a formal responsibility matrix. These actions clarified accountability and responsibility throughout all levels of the project, improving decision making as well as the delivery effectiveness of the project team.
* PM Solutions provided a senior program manager dedicated to the implementation of claims administration services for a new retail client. They worked together to integrate and coordinate multiple work streams including groups from business, operations, marketing, implementation, real estate, and technology. Standardized documentation was created for individual work stream reporting and shared with other team members, and an integrated program level master plan was developed.
* Mentoring and formal training was provided by PM Solutions for all the company’s project managers involved in the program initiatives, improving key monitoring and control aspects such as meetings management, communications, and project artifact content. Over 100 colleagues attended the workshops and utilized the project toolkit developed exclusively for them.
* To improve the development effort supporting the acquisition, an agile methodology was introduced, focusing on improving the business requirements definition. The improved requirements definition process led to better solutioning, testing, and traceability, and ultimately a completed program with 100% client retention.

**Results**

The company, with PM Solutions’ expert guidance, was able to leverage standard project management concepts and strategies and adapt them to the company’s unique requirements. The result was a successful organizational transformation, integrating more than 1,000 new clients, opening two call centers, and doubling the number of claims serviced — while meeting program deadlines and contractual obligations.

1. The overall acquisition program was reset and successfully recovered, with all of the new targets and milestones achieved within eight months.
2. For the company’s new retail client, two new call centers went live as scheduled including renovation of new facilities, development of client-specific policies and procedures, hiring new colleagues, and installation of infrastructure to support the centers.
3. The mentoring, training, and PM Toolkit provided efficient and consistent introduction to and reinforcement of project management principles. All of the artifacts created for these programs were developed with the goal of providing a foundation for eventually building a corporate PMO.
4. For the development effort, a team consisting of Business, Practice, and Technology colleagues was assembled. Once the team was comfortable with the agile process, the development targets were reset, creating more realistic target dates and deliverables.

Leveraging the support of PM Solutions, these collective initiatives were successfully undertaken in parallel, allowing the company to achieve the intended return on investment of the acquisitions, increasing corporate revenues by 30%.