



Company Background

EMC Insurance Companies is built on nearly 100 years of serving policyholders and independent insurance agents. Today, EMC has grown to become one of the largest property and casualty companies in Iowa with more than 2,300 employees and assets exceeding \$3 billion. Nationally, EMC ranks among the top 60 insurance organizations.

Business Context

Ken Fitzgerald was appointed Director of the newly created Program Management Office (PMO) for EMC Insurance Companies in late-2006. Once on board, he was faced with getting it up-and-running and starting the complex task of institutionalizing project management principles throughout the company.

He found the combination of the TenStep™ Project Management process and cOrdin8 to be a compelling solution to establish and accelerate their new project management culture.

The PMO has responsibility for managing information for the largest projects in the company. They regularly review the latest status of all Tier I (high priority) projects with the PMO Oversight Committee which is comprised of the top three officers of the company, plus the senior officer over the IT Department and one of a resident VPs and branch managers (representing one of the 16 branch offices nationwide).

Application of cordin8

cordin8 technologies, llc worked with the PMO team to customize cordin8 to fit their business. The customization involved embedding their project proposal form for the PMO Dashboard which was organized by projects to be prioritized by the Oversight Committee and a view of the status of all active and completed projects.

Project teams use the pre-configured project notebooks containing the TenStep™ project management process, which includes forms for the project charter, issues, risks, scope changes, status reports, and more.

The teams use other notebook sections to work on business requirements and design Q&A. In the design Q&A section, designers and developers document questions about the requirements that business users answer. This section keeps all of this communication organized.

Results

With cordin8, EMC now has a prioritized list of all large projects, projects to be prioritized, and a place to view the status of all these company-wide projects. The project notebooks which contain the TenStep™ project management process provides a consistent set of tools for project managers, which will contribute to their longer term goal of establishing a project management culture.

In their words

***Ken Fitzgerald,
Director, PMO
EMC Insurance
Companies***

"Faced with the significant challenge of implementing the first-ever project office here at EMC, our core group of three dedicated project managers treated this challenge at the beginning just as we would with any project - we focused all of our efforts on the planning process first and foremost. Throughout those 6-to-8 weeks, it started to become more and more clear every day that in order for our small project team to make this PMO implementation successful in such a short time - as we were requested to have the department and the processes up and running in 14 months - we were going to need some outside, expert assistance in two primary areas: the overall project management methodology (templates, documented best practices, consistent terminology, etc.) and a software tool to help project teams manage projects and to help our PMO manage the overall portfolio.

"Once we identified the existing portfolio contained some significantly large projects and a heavy volume of smaller projects, it also became clear that our EMC project management methodology would need to be scalable - one size would not fit all. And since all formal project management was going to be new to the company and would inevitably require some changes to our culture, we also needed a practical and easy-to-understand approach. All of our research pointed to TenStep, Inc.

"Through our partnership planning with TenStep, it also became crystal clear that our software vendor would need to not only be compatible with TenStep, but that it would also need to be scalable and easily customizable, as well as supported by excellent customer service. The cOrdin8 TenStep Solution had already brought these two supportive organizations together - and it was clear that both parties, each extremely knowledgeable in their own right in the area of project management, had already researched and identified the expertise in each other's products. That really helped boost our confidence level that we were making the right decision in moving forward with the combination.

"And we are really glad we did. Not quite a year into our overall PMO implementation, we already have a very scalable, documented, and easily-trainable project management software platform in place - supported by a world-renown methodology that has been customized to fit EMC's culture and our specific PMO approach.

"These advancements could not have been possible without the insight and support of the cOrdin8 staff. They really focus on customer service; and that is just so important with any new technology. And they back up that customer service with significant project management knowledge and insight, as well as sound thought and advice on the overall aspects of fundamental portfolio management.

"Partnering with cOrdin8 has been an invaluable experience for our PMO staff, and they have really helped contribute to the overall success of our implementation project here at EMC. Without hesitation, we would recommend them to any PMO Department looking for the same types of things we were...and that goes for the overall cOrdin8 TenStep Solution as well.