



# Agile Transformation Produces Leaner, More Responsive Insurance Giant



Enterprise Agile transformation is difficult enough under normal circumstances. Add in the integration of a recent acquisition and an enterprise-wide organizational realignment, and you have a real challenge for any Agile coaching and training effort.

“People were changing titles, moving around, and there was still a lot of dust in the air,” said MATRIX Director of the National Agile Practice, Tony Shawver.

This is the situation MATRIX stepped into in 2015 -- endeavoring to help the large, international, waterfall-based insurance organization transform to a more Agile workplace, despite all the moving parts.



## Putting disparate systems and processes under one Agile umbrella

An international provider of targeted, specialized insurance products, the company had acquired a new business unit, significantly increasing its presence in the property preservation, restoration, and inspection services business.

The new business unit had “done Agile” in the past with some success, moved to waterfall after the transition to fit with the acquiring enterprise’s practices, and was now returning to Agile to give it another try to succeed in a bigger way.

This latest acquisition was enough motivation for the company to seek a change to processes, people, and tools, as well as a significant culture shift to bring everybody under one Agile umbrella.

MATRIX Account Executive, Jon Bass, explains why, “The company has grown by acquisition by a large degree with a lot of disparate systems and processes. Ultimately, they realized they needed to get faster, more responsive to business demands, and leaner. Agile was one pathway for them to accomplish those objectives.”

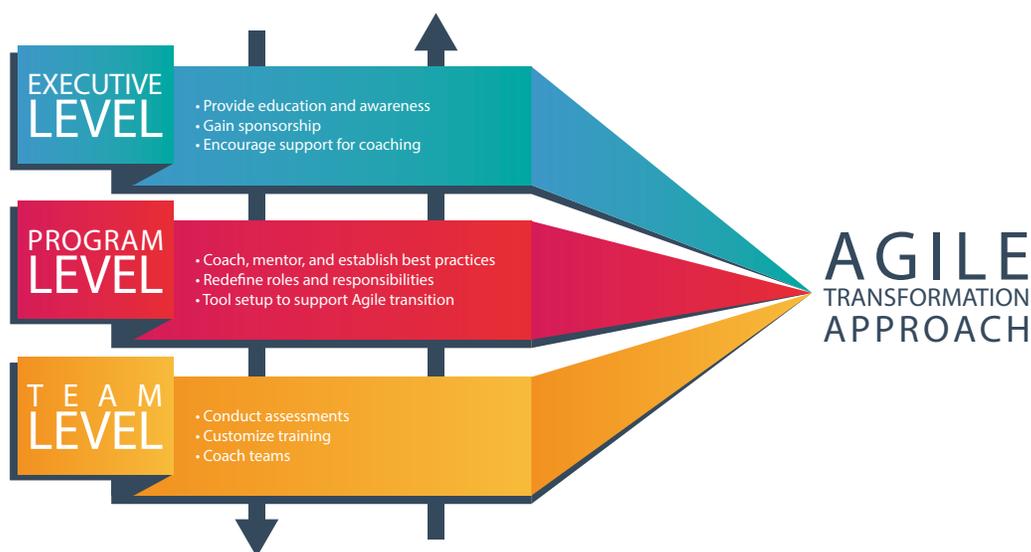
After talking to MATRIX about its Agile coaching practice, and completing a competitive RFP process, the insurance company engaged MATRIX for an Agile transformation project.

The engagement was very targeted toward specific needs including assessments, training, and coaching of specific business units and products. The engagement spanned working with the various groups and business units at the Team level, Program level, and Executive level. The overall goal was to make the organization leaner and more responsive to market demands.

## Customized approach from the top-down and bottom-up

As with all its engagements, MATRIX customized its approach to specific needs rather than force-fitting a set solution while still retaining the Agile foundational values to ensure success. Along the way, MATRIX adjusted and re-prioritized its process based on its findings and the company's evolving needs.

Working in parallel across these levels, MATRIX approached this engagement from the top-down, training executives and leadership, and bottom-up, assessing, coaching, and training specific project teams.



At the Team level, MATRIX first conducted assessments of existing teams as a baseline to discover where teams were in their Agile journey and to uncover areas in need of the most improvement. Afterwards, MATRIX created customized trainings and provided Agile coaching. Teams responded by improving predictability and reducing average lead times of the reporting backlog.

At the Program level, MATRIX provided coaching and helped to establish best practices for the PMO, product groups, and various Business units. This included activities such as assisting with tool setup to support Agile transition, mentoring the first batch of project managers, scrum masters and coaches, and working with the company on redefining roles and responsibilities.

At the Executive level, MATRIX provided education and awareness to executives and senior leadership to help gain the necessary sponsorship for the organization's Agile transformation. MATRIX pushed the envelope on what it meant to be Agile. Because of this, the leaders started to support the team in adopting additional practices and began encouraging the team to be receptive to coaching.

Collaboratively, MATRIX reviewed the assessment results with stakeholders in order to create an Agile roadmap that the client could use as they advanced their own practices.



## Making commitments and actually keeping them

Small successes among teams set the stage for larger improvements. For instance, one particular team that had never delivered on all of their commitments before was now able to deliver on every commitment, for the first time. On a larger scale, MATRIX was able to help this insurance industry leader through a smooth and efficient transition at scale, all the while guiding them through a significant change to processes, people, and tools.

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MATRIX is a technology solutions provider that blends staffing, consulting and professional services to help companies solve tough IT and business challenges in an increasingly complex and competitive world. Over the last 10 years, we've delivered more than 1,000 IT projects and filled nearly 25,000 jobs with talented IT professionals for clients across the U.S.