



## CASE STUDY

# Insurance and Financial Services Company

EXECUTING AT THE ENTERPRISE LEVEL BY CONNECTING JIRA TEAMS TO PROGRAMS AND STRATEGY

### COMPANY OVERVIEW

**COMPANY GLOBAL RANK:**  
Fortune 500

**REGION:**  
North America

**INDUSTRY:**  
Insurance and Financial Services

### IMPLEMENTATION OVERVIEW

**SCOPE:**  
Business Unit

**SEATS:**  
2,000+

**FRAMEWORK:**  
SAFe

**TEAM TOOL:**  
Jira

**LEVEL:**  
Portfolio

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## CHALLENGES

As IT areas transitioned from managing efforts in a waterfall method to the implementation of SAFe™, it became clear that the current tools based on tracking individual user capacity (team tools alone) would not effectively work for them.

They needed the ability to collaborate, prioritize and manage work at team, program, portfolio, and enterprise levels.

There was difficulty in getting Program Managers and people at other levels of the business connecting into common tooling so that data consistency was reliable.

## SOLUTIONS

AgileCraft allowed RTEs to manage work at the strategy and theme levels, while maintaining critical connection to the work on teams. Teams also had new visibility to the portfolio and overall strategy.

AgileCraft solutions services were employed for their implementation of capabilities across portfolios and established an effective enterprise hierarchy structure.

A robust, bi-directional synchronization based on AgileCraft's T-Rex technology between Jira at the team level was implemented.

## RESULTS

Leaders were finally able to track, plan, and prioritize epics and features during PI execution.

While it was originally brought in by one business partner, AgileCraft has since rapidly evolved into an enterprise tool used in groups across the company. Each business partner is using the application at different levels of application and SAFe™ maturity.

They were able to limit change with the Jira team users so they could continue to efficiently manage their work at the team level, while increasing visibility at the program and portfolio levels.

## BENEFITS

### UNDERSTAND WHY

Studies have shown 50% productivity gains when information workers know why their work matters to the mission of the company.

*HOW: Strategy, theme and epic value measurement with T-rex distribution down the backlog*

### DRIVE STRATEGIC ALIGNMENT

When the business is connected in real time to the status of strategic initiatives, leadership has the information to shift direction and stay more competitive.

*HOW: Strategic snapshots, theme to strategy linking, feature tree (strategy view)*

### SUCCESSFULLY ROLL OUT SAFe

Drive operational excellence with SAFe, DAD, LeSS (or your Hybrid) with out of the box support for scaled agile frameworks to dramatically improve likelihood of success.

*HOW: Strong WSFJ support, theme management, Risk ROAMing, ART budgeting, SAFe metrics*