

Paramount Health Care Gets A Clean Bill Of Health With **Serena Software**

Serena Mariner – Just What The Doctor Prescribed



COMPANY Paramount Health Care LOCATION United States URL www.paramounthealthcare.com
INDUSTRY Health Care Insurance PRODUCT Serena Mariner
APPLICATION Product Portfolio Management

“Mariner is a part of everything we do now.”

Brad Behrendt, Special Projects Administrator,
Paramount Health Care

CHALLENGE

Lack of control over time tracking

Lost productivity gathering data each quarter

Critical decisions being made with untrustworthy data

SOLUTION

Serena Mariner

Executive Dashboard on demand

RESULTS

Visibility

Better decision making capabilities due to current data at their fingertips

Greatly improved productivity and quality with integrated design, development and test processes

Executive Summary

Every CIO wants to know it. How many projects are in being worked? How many are in the pipeline? What are the priorities? What if we change priorities? Are my resources being fully utilized? Simple. So why is it so difficult to get? Paramount Health Care was tired of band aids. It was time for surgery.

The information existed. The problem was getting it into one place and making sure it was current. Manual effort often took 1-2 days to gather the data. By the time the data was gathered, analyzed, summarized and put into charts, reports and presentations for executive management, it was likely no longer accurate. And if a new, higher priority project was requested, it took even more time to determine the impact. Fortunately, Brad Behrendt at Paramount Health Care realized that this scramble was just a symptom. He decided it was time to look at some new medicine.

Old Prescription: Microsoft Excel Spreadsheets

Choke down one project portfolio management report each quarter.

Side effects include:

- **Weight loss** from running around gathering data from individuals.
- **Carpal tunnel** from keying in a large amount of data.
- **Eyestrain** from creating various ways to view data so the right decisions can be made.
- **Headache** from the last minute high priority project that came in one day before the executive review.
- **Heartburn** from trying to figure out which resources to shift and how it will impact the rest of the schedule.
- **High blood pressure** from stress of presenting executives with reports that may no longer be current.

Additional side effects are extremely likely, and may affect those who come into contact with you. Take with extreme caution.

New Prescription: Serena Mariner

Enjoy accurate, up-to-date drill-down data at your fingertips anytime you want it.

Side effects include:

- **Excessively happy and relaxed executives, management and staff.**

Challenge

Producing a report with how much time an employee spent on a given project by department should be a basic, simple task. For Brad Behrendt, Special Projects Administrator at Paramount Health Care, it was a nightmare. Each quarter, the executive staff wanted to know projects were being worked, what work was done last quarter and what the plans were for the next quarter and the next year. Each quarter, Information System Managers would set about gathering this information from various people, files and resources, and put it into a nice, neat spreadsheet.

Never mind that it often took 1-2 days to gather the right information, or that there was much frustration and time spent walking around, placing phone calls or emails in anticipation of a reply, reviewing various databases and searching for the most current file. Throw in an urgent project and you've got a lot of work to figure out which resources can be reallocated for the project and how it impacts the report you've just created before you present it to the executive staff.

"Before Serena Mariner, we tracked things manually in Microsoft Excel. We also had a Microsoft Access database to manage program and project requests, but it proved difficult to keep it up-to-date," said Behrendt. Because of the very manual nature, tying together projects and time spent was extremely time-consuming. As they began to look for a better way to manage their projects, they realized that they also needed a way to manage prioritization of projects.

A few different tools had been evaluated by his predecessor, and then a new employee from the Finance team suggested they look at Serena Mariner, a tool he had used at a previous organization. With limited time and a lot of pressure from management, Serena Mariner was added to the short list and it quickly became clear that it both met and exceeded their initial requirements. In addition, it was easier to use and the Web interface was clean and simple.

Solution

After purchasing Serena Mariner in September 2006, Behrendt attended a four day Administrator training course. With the tool selected, Behrendt focused on creating the right configuration. The first phase consisted of retiring their Microsoft Access database in favor of Serena Mariner to manage demand. It took three to four months of cross-functional requirements meetings to determine the optimal processes, data and configuration. With one person spending approximately 30 percent of his time, the configuration and data transfer took two months.

The second phase included time tracking capabilities, then prioritization. Shortly after, Behrendt attended the 2007 Serena xChange Conference (now Serena's TAG Conference) where he learned about some reporting options that he knew would knock the socks off of his executive staff. "Within a couple of weeks of returning from the conference, we had some great reports created. Now we are report crazy," said Behrendt.

Serena Mariner is used throughout the Information Systems organization including programmers, project managers, technical support, application support, the system configuration team and technical services. They added the configuration team into the system and configured Serena Mariner to help support them. It has been widely adopted.

Results

"Visibility this has been the number one benefit. It has really opened our eyes, especially managers and team leads, into what people are doing," says Behrendt. "We have custom reports allowing us to get at the data we need, and it's just part of the process. It's no longer a fire drill to get a simple list of what people are working on." Managers can now see that they are working on the right things, preventing a repeat of historical mishaps with someone working on a project where months might go by before the project was questioned.

Prioritization is where things really started to come together. Rolled out in the second phase, the project prioritization team now had total transparency. With tangible data, they can quickly see their top twenty projects, project start and end times, whether time is being spent on the priority projects and much more. "Decisions are now made with the right information rather than who spoke the loudest in the meeting." The Director of IS and managers look at which resources are coming available and which projects need to get dropped or pushed back. The biggest benefit for the department has been the vastly increased productivity for managers and their staff. While it was possible to make the data available before, it is now much easier for the staff to keep the data current.

Customized reporting was a tipping point for Behrendt. Chicago. September 2007. Behrendt attended a reporting session at Serena's annual user conference. At the end, "it was like a light bulb lit up in my head," said Behrendt. "I couldn't wait to get back to the office to begin designing reports for my executive staff." That lecture was invaluable to Behrendt and his organization. He has now created drill-down pie charts that his executive team now can't live without.

He created a dashboard that provides all staff levels with information to make better decisions. The executive and management teams can easily see the workload distribution, project prioritization and the impact of a new project. The staff members know what projects exist and the resources assigned to each project. Meaningful data can now be mined from the system. For example, programmers can now specify that they spent a certain amount of time programming, conducting design work and conducting analysis for 40 hours instead of the basic '40 hours of programming' they were tied to in their previous time tracking system.

The most used report is the brainchild of his boss, Dave Cook, who had created it in Microsoft Excel years ago. It consists of a pie chart report that they can drill into. For example, he can see the projects or activities each area in the Information Systems department is working on by percentage. He can then drill into a project or activity and see the details. The lowest level of the report shows the details of an individual project or activity. This information can also be broken down by department. With a dozen or so departments in the company, it is now easy to see how much time, for example, was spent on projects for the Membership department for the month of April. From there, one can drill down to see the projects.

"This kind of reporting was beyond the original requirements, but has become the single most important visibility tool for management." Because the data is so clear and beautifully displayed, the value that Serena Mariner provides is readily apparent. They are planning to expand how they use the system and start focusing on getting more financial data into it.

"Serena Mariner has become a part of everything we do. We've come a long way. We were doing some of these things before, but now it is ingrained into our day-to-day work," says Behrendt. As time goes forward, the demands on the department are increasing. Outside of his department, they aren't aware that the tool made the difference, but they can see that things are getting done faster and better. "We like that it's a deep tool but you don't have to use every feature immediately. We intend to roll out the various features of Serena Mariner as the need arises for us. It's not my full-time job! We just do bits at a time."

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**Brad Behrendt, Special Projects Administrator,
Paramount Health Care**



ABOUT SERENA

Serena is a privately owned company, headquartered in Redwood City, California, with 29 offices in 14 countries and almost 1000 employees. Serena provides software on premise and on demand to over 15,000 customers including 96 of the Fortune 100. Serena enables teams of programmers to become more efficient by standardizing and automating development processes across both mainframe and distributed environments. Serena enables IT business analysts and power users to improve productivity with a new generation of Web 2.0 tools to build Business Mashups. Business Mashups automate common every day processes, are visual and do not require coding. Serena also enables IT executives to gain visibility into their projects, resources and costs – CIO’s should have access to the same quality of information about IT as the CFO has about Finance. For more information on Serena, visit www.serena.com.

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