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ROLAND Rechtsschutz-Versicherungs-AG celebrated its 50th anniversary in 2007. The company, which began in a small office in Cologne in 1957, is now the third-largest German legal expenses insurer.

We spoke to the company organization spokesman, Thomas Dembach, about the introduction and use of Blue Ant.



DER RECHTSSCHUTZ-VERSICHERER.

## Case Study

**Mr Dembach, what is your position at ROLAND Rechtsschutz-Versicherungs-AG and what is your remit?**

I am a Consultant in the business organization or, more precisely in the Process and Project Management Team. Here, I act mainly as Project Portfolio Manager and am responsible for the development of project management methods and tools. I also manage my own projects. As Portfolio Manager I am responsible for new projects and activities in the preparation and initiation phase. I also work closely with our Corporate Development and Risk Management departments, when prioritizing the projects for the portfolio. I regularly take part in status meetings with the Project Managers of the most important current projects and collate the information I obtain in monthly performance reports for our Portfolio Board.



Thomas Dembach, Consultant in the Process and Project Management Team at ROLAND Rechtsschutz-Versicherungs-AG

### **Can you give us an example of when your company's services are used?**

As soon as you walk out onto the street you are a road user. In the event of an accident, considerable expenses can arise. Compensation, loss of earnings and damages often have to be claimed for in court. This doesn't just apply to accidents: ROLAND Legal Expenses also assists insured customers when there is trouble with a garage or disputes arising from the purchase or sale of a vehicle. It's easy to get lost in the legal jungle. People often forego their rights because of financial risks. ROLAND Rechtsschutz helps customers fight for their rights with special coverage concepts for private households. With products for commercial customers, we offer tailor-made solutions for businesses and professional groups, for example for top managers, doctors, accountants and architects. A total of 1.8 million insured rely on ROLAND's experience.

### **How would you describe the project landscape at ROLAND Rechtsschutz-Versicherungs-AG?**

Varied. The project landscape at ROLAND currently encompasses more than 20 projects and programmes. At ROLAND, a project is only considered a project if it includes at least one external project budget of € 50,000 or internal staff work effort of 100 man-days. In some cases however, the risk situation or the number of departments involved is a factor. The projects are sometimes purely IT issues, sometimes organisational projects or important strategic tasks. Some projects with significant interdependencies are also combined and processed in programme form.

### **Did you have another project management tool before Blue Ant?**

We mainly used various templates in Excel showing the scope planning (Work effort/Costs) and work performed recording. There were some projects and project plans in MS Project for the schedule planning and resource planning, too. For documenting project results and filing project documents, we used Lotus Notes. In fact, project document filing is still done this way.

### **What was the reason for introducing project management software at ROLAND Rechtsschutz-Versicherungs-AG?**

Internal work on projects takes up well over 10% of our total staff capacity, overall. So, it's important to manage the use of resources so that the quality of our services and service level don't suffer as a result of the project business. Our customers should, after all, only notice the positive results of the projects, not the actual project work.

There have also always been the typical symptoms when attempting to manage projects with Excel or rather without an integrated system. There were different versions of files circulating between the project managers, the project team and Portfolio Management. So, in several cases, short-term changes had to be made. Excel doesn't cater for collaborative working. As a result, the most work was frequently left to the project managers, who had to centrally manage the various files, and so had less time to work on the actual project.

### **What was the decisive factor in your decision to use Blue Ant as multi-project management software?**

Our aim was to find an integrated tool for project and portfolio management that could easily be integrated into the system environment and allowed the central planning, recording and management of project-specific parameters. It also had to support our planning process and enable us to plan and visualize the use of resources across all projects through to line activities. The overall view of the project costs and investments was also important, as was support for our risk management. There are not just internal, but external requirements from the regulatory authority to consider here, too. Of course, it was also important to have more reporting options that meet our requirements or are customizable. Ultimately, of course, the licensing model and operating costs also played a role in the decision to choose Blue Ant.

### **How did you find Blue Ant?**

We looked at several tools during the tendering phase. After the presentation of Blue Ant by proventis' co-operation partner Renovatio GmbH & Co. KG, we had a feeling the tool might be suitable. We had a contact person for Blue Ant in Mr. Heinz Nikolaus

from Renovatio, who accompanied us not only through the tendering process, but also in the implementation of the tool.

### **How did you organise the introduction of Blue Ant?**

After the installation and extensive customizing were finished, we decided to pilot the tool in two projects. One was a project for the migration to SEPA and the other an analysis project for a new quote system. During this time I worked very closely with the two project managers to incorporate the experience gained directly into the customizing and also to informally improve the reporting system.

In cooperation with the HR department, I also offered training during the pilot phase, so that around 60 staff were trained to use the tool. For simple activities, such as time recording, I put together brief instructions which were available on our company intranet.

After around 9 months, the pilot phase was completed and we decided to "go live" company-wide. From this point on, all new projects used Blue Ant as the only tool for planning, management and controlling. Of course this was a big change for the "old hands" in project business, but there was no major resistance.

At regular intervals, a lively exchange about problems and potential improvements for the use of Blue Ant takes place with the "intensive users". Every now and then again we get a "But it worked before...". However, Blue Ant is an accepted tool in the meantime.

### **How many employees currently work with Blue Ant?**

Around 250 employees from almost all areas of the ROLAND group now use Blue Ant.

### **What has changed in the project work at ROLAND Rechtsschutz-Versicherungs-AG since Blue Ant has been introduced?**

In general, project management and project work at ROLAND in recent years has received more and more attention. It is hard to say whether this is because of Blue Ant. My job has been made easier by the introduction of Blue Ant. I do not have to juggle Excel files to see the project portfolio status any more, but get my information in a few clicks.

### **How was Blue Ant integrated into the existing Controlling landscape?**

We can pull the information for the project registration in the portfolio board directly from Blue Ant. We asked proventis to create a BIRT report that collects the important information (costs, effort, investments, duration) from Blue Ant and processes it accordingly. We were also able to simplify the Risk Report. The project manager now only has to manage the risks in Blue Ant. The risk report is then printed directly from Blue Ant. And finally, it is of course also possible to fill the performance report for the projects with the key figures from Blue Ant. We have not realized this step as a BIRT report yet, but this information is provided at a glance by Blue Ant as of version 10.3 using the integrated status report.

### **Why could Blue Ant also be interesting for other companies?**

Blue Ant functions and modules are based on workflow and the allocation of information. In the past, staff had to have an MS

Project license to see the project plan or make do with hard-to-read PDFs from projects. Today they can see all their own activities in the time recording, and if that's not enough, they can also go straight to the project plan. A complete picture of the resource situation can also be created with Blue Ant. Which employees are working on which projects and even what impact this has on the remaining time available is clear in Blue Ant. In addition, Blue Ant is a web-based application. Because the information is stored centrally, all data can be evaluated. BIRT Reports can be created and adapted to the specific company design.

### **How do you see the future collaboration between ROLAND Rechtsschutz-Versicherungs-AG and proventis?**

We are currently planning the implementation of a technical process for the maintenance of our HR master data. proventis are helping us to connect our company's central directory with our own authentication system.

**Thank you for talking to us, Mr Dembach.**