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Enterprise Transformation Services: Strategic Assessments and Roadmaps

Client background:

A multi-billion dollar mutual insurance company that provides a broad array of commercial and consumer insurance products through teaming partners in the financial services industry.

The business challenge:

As the company worked on new product introduction and the creation of new go-to-market channels, they were facing a large and growing portfolio of complicated transformation projects.

The company was initiating a very large and complex transformation project that would have a major impact across the enterprise. The transformation project represented a significant portion of the overall project portfolio and they wanted to ensure they had the correct strategy and structure in place to be successful. They contracted Baker Tilly to conduct a strategic assessment (health check) supported with an improvement roadmap for the project.

The Baker Tilly approach:

Baker Tilly conducted a Project Quality Assessment (PQA) during the initial stage of the project to potentially mitigate downstream risks. For the stage one PQA, Baker Tilly utilized two strategies to assess whether or not the project was positioned for success.

First, a variety of interviews were conducted across all project team functions to understand the project team structure, strategy, planning, and communication plans. The interviews focused on understanding team members' perspectives on risks, risk mitigation, and overall improvements for this complex transformation.

Second, all project initiation documents (e.g. project charters, team lead structure, project management documents, project methodologies and people change management approaches) were analyzed and compared against data points, project themes and best practice strategies / templates that Baker Tilly has developed from conducting over 100 large transformational PQA's across many companies and industries. The Baker Tilly team synthesized and identified project level risks and the associated risk mitigation recommendations (e.g. data integration scope and budget was insufficient; more work was required to build out the change management approach). Baker Tilly then presented the risks to the project leadership along with a set of recommendations / plans to implement the recommendations.

Business impact:

The PQA identified issues before a large amount of time was spent on design and development. The project team was able to reshape the program and position it for success. Additionally, the project saved time, money, and mitigated a variety of risks that could have occurred later in the project.

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