

# Lumeris Retains Control of Investments and Optimizes Resources with Project & Portfolio Management SaaS

**Lumeris**



## CLIENT PROFILE

**Industry:** High-tech

**Company:** Lumeris

### BUSINESS

Lumeris is an accountable care delivery innovation company offering health systems, payers and providers the technology, operational support and consulting services they need to thrive in accountable care.

### CHALLENGE

As Lumeris is rapidly expanding, the customer service team needed greater project visibility, including insight into how resources and investments were being used.

### SOLUTION

Project & Portfolio Management SaaS is used by 350 product development and client service management professionals to track their activities across over 30 projects.

### BENEFIT

Lumeris allocates resources and manages projects more efficiently ensuring delivery on time and on budget, safeguarding customer service levels that ultimately support business growth.

## Business

### Helping the healthcare sector improve performance

Transforming the US health care market, Lumeris' innovative solutions help health care organizations design, build, operate, measure and optimize any accountable care model. The depth and breadth of Lumeris' solutions — combined with its extensive experience in accountable care — make the company an ideal partner for any health care organization seeking the benefits of a better connected, aligned and informed accountable delivery system.

Lumeris' revolutionary technology platform for accountable care integrates data from disparate systems across the continuum of care — including claims, EMR, pharmacy and lab — to provide complete visibility into patient care and the clinical and financial performance of an enterprise, helping customers achieve better cost and clinical outcomes.

With market-leading cloud-based solutions, Lumeris' technology is purpose-built from the ground up to help clients achieve the Triple Aim Plus One: improved cost, quality and patient and physician satisfaction. Headquartered in St. Louis, the company has operations in St. Louis, Austin and Boston in the US, and Hyderabad in India.

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## Challenge

### Safeguarding customer services while achieving growth targets

To retain market leadership, Lumeris uses the latest cloud computing services and tools. Having no architectural legacies that slow the rate of innovation, Lumeris can remain endlessly current and relevant in a technological age, delivering best-in-class products and solutions to the industry.

In order to stay continuously innovative, Lumeris needed to maintain a high level of customer service while remaining focused on delivering state-of-the-art services.

These services range widely and include:

- Client services projects where a custom Web interface is needed for a healthcare provider, allowing physicians to check the status of patient records
- Internal development projects where the company develops a new application that it will later market into the community.

To improve outcomes, Lumeris' IT team realized it needed to consolidate the project and portfolio management processes and systems leveraged by multiple development organizations.

Donna Thomas, Vice President of Lumeris Project Management Office, comments, "Delivery date needed to be met despite growing demand, and without a comprehensive view of our project demands, our resources were not always being leveraged effectively.

Changes were also driven by the new senior executive team, who required insight into the status of all projects in progress along with how resources were being used against those projects.

The senior executives gave the product development and client services organization six weeks to implement a project and portfolio management solution to meet demands.

“We needed a project and portfolio management solution that would provide integrated visibility of our projects and investments,” Thomas said. “We also needed to be able to assess the profitability of our client services projects and the return on investment for our internal development projects.”

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## Solution

### **Centralized visibility of the project portfolio in just six weeks**

To address its project, portfolio and resource management needs, Lumeris implemented the Microsoft Solution Framework (MSF), and created a shortlist of best-of-breed solutions before ultimately selecting CA Project & Portfolio Management SaaS.

According to Thomas, CA Project & Portfolio Management SaaS was selected because of the breadth of the product and its ability to provide visibility across an entire portfolio. Lumeris chose to deploy the Project & Portfolio Management SaaS solution on a software- as-a-service basis to enable faster deployment and reduce the overhead of systems support.

CA Technologies introduced Lumeris to its premier partner, Digital Celerity, a project and portfolio management and agile solution specialist with over 10 years’ experience of implementing CA Project & Portfolio Management SaaS, to help deploy and configure the solution

By leveraging its ‘Celerity Assure for Project & Portfolio Management SaaS’ methodology and best practice approach, Digital Celerity was able to deploy the solution on time and below budget, having an operational system within six weeks of signing the contract.

During the implementation, Digital Celerity delivered instructor-led and computer-based training to Lumeris’ project team and project managers. In turn, managers trained their own teams. Because of the solution’s intuitiveness, just a very brief, single-page user guide was enough to ensure all project professionals could use it to effectively record their timesheets.

Only three weeks following the CA Project & Portfolio Management SaaS go-live, 95 percent of the organization submitted timesheets and routed approvals successfully.

### **Managing resources and risk**

CA Project & Portfolio Management SaaS provides Lumeris with a framework for best practices in project management. “From day one all we were able to see how our resources were being used against projects, which was one of our key objectives,” says Thomas.

Reports developed with help from Digital Celerity are used every week at executive team meetings where they review the projects that are in process. As a result, bottlenecks and potential problems are identified faster and dealt with proactively before they become critical.

With continuous improvement at the heart of the implementation, the solution continues to evolve; having successfully integrated Lumeris' financial and HR systems with CA Project & Portfolio Management SaaS, improved financial management is next on the company's project and portfolio management and governance maturity roadmap.

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## Benefi

### **Greater efficiency and better business decisions**

Using CA Project & Portfolio Management SaaS gives Lumeris a greater view of projects and resources. With timesheet compliance rates as high as 95 percent, Lumeris is able to match the right people to the right projects.

“Enhanced project and portfolio management enables us to evaluate our project investments more easily.”

**Donna Thomas**

Vice President, Project Management Office, Lumeris

Additionally, enhanced project, resource and portfolio management have successfully enabled Lumeris to:

- Meet internal governance standards
- Increase the efficiency of project management
- Deliver more projects on time and on budget
- Manage more projects with less impact on resources
- Make better business decisions.

“Enhanced project, resource and portfolio management enables us to track, measure and evaluate our project investments more easily,” says Thomas. “This is vital to maintaining control as our company continues to thrive and grow.”

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Founded in 2003, Digital Celerity celebrates its 10th anniversary providing thought leadership and expert services in four interrelated pillars: Project Portfolio Management (PPM); IT Service Management (ITSM); IT Governance & Project Management Offices (PMO's); and Enterprise Agile Adoption. Specific services include: deep dive assessments, consulting and advising, training and mentoring, system installation and integration, implementation and organizational adoption, upgrades, and support. Digital Celerity is headquartered in San Francisco, CA, with local office throughout North America, Mexico, Europe & India and over fifty prominent industry experts delighting a continually growing list of clients in retail, insurance, finance, healthcare, new product development, and many more industries. Digital Celerity is a Premier Partner and leading reseller of CA Technologies Project & Portfolio Management SaaS, Agile, and Service Management solutions.

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