



“Strategy driven and benefit focused”

This is how Rick Wilson, Head of Strategy, Planning and Control for UnumProvident, described UnumProvident’s plan for investment in change in an interview with sigma’s Business Manager, Fiona Ramsay.

Tell me something about UnumProvident and its involvement with Benefit Realisation Management.

UnumProvident is the UK’s market leader in the provision of Group Income Protection, protecting more than two million lives through group schemes and individual policies. It’s a competitive marketplace and UnumProvident has achieved its position through investment in change and development. In 2004 I asked myself some straightforward questions about UnumProvident’s investment, such as “What benefits are we expecting from this year’s projects?” and “Which projects are contributing to our long-term growth plan?”. I realised that I didn’t have complete answers and didn’t have the means of getting them.

I had attended a Benefit Realisation Management seminar held by sigma and had been very impressed with the practical methodology outlined there. I felt that application of the sigma BRM process, techniques and toolkits would enable UnumProvident to identify the benefits, both tangible and intangible, that any particular project would bring, and then assess them against UnumProvident’s strategic objectives.

What have been the benefits of working with sigma?

The first major benefit of the sigma methodology was that for the first time, project team members shared one common understanding of the project objectives. My experience of heading up many IT projects was that although all the team members thought they understood the project’s objectives, in fact they all had a different understanding, each being influenced by their own particular function in the organisation.

To which projects have you applied the sigma methodology?

Several, but the one that springs to mind is the e-business programme. It was tremendously powerful to create a road map of benefits and see how they would

impact the business as a whole. It meant that instead of being IT-driven, the programme was benefit driven.

What do you mean by being benefit driven?

In simple terms, I mean the team was able to prioritise project tasks according to the impact that the benefit to which the tasks related would have on the business. For example, one particular benefit might contribute 80% of the project's total impact on the business. The tasks relating to that benefit would be the ones to give priority to.

That said, deciding the business impact of a benefit is hard to do and you may have to settle for a consensus opinion.

What would you do differently if you had known then what you know now?

I would assign someone the responsibility for measuring and reporting back on the benefits being achieved. This is just as important as identifying them in the first place. Measuring them provides a way of checking whether the project is on course to achieve its objectives, and to take corrective action if necessary. Expressing big objectives as a number of measurable benefits also makes them more relevant and personal to individual employees and creates support for implementing the changes.

What next for UnumProvident?

The next step for UnumProvident is to use the sigma methodology to express its strategic objectives in terms of benefits, ie taking what we want to do into how to do it. From this we will clearly see the future projects required to deliver strategic benefits and objectives. We will have a clear basis for investment in development and project selection and can be sure that our development plan is strategy driven and benefit focused.