

CASE STUDY

---

# Vitality:

## A Year in the Life of KeyedIn

---

*Vitality*<sup>®</sup>



Vitality is a UK-based health, life insurance and investment company with a mission to make people healthier and happier while enhancing and protecting their lives. Vitality has worked to disrupt the way the insurance industry conducts business by developing innovative products, including shared value insurance plans that incentivize health and wellness while driving down premiums and costs for both its customers and the company itself. Vitality, with its parent group Discovery, has established a bold new pledge – to get 100 million people 20% more active by 2025.

Over the course of a year, the project management office (PMO) at Vitality researched, evaluated, and implemented project portfolio management (PPM) software to meet the needs of their organization. They ultimately chose to partner with KeyedIn and shared their experience both in the evaluation and implementation of the solution to help other PMOs going through a similar process.

---

## The Challenge

As a devoted market disruptor and agile organization, Vitality is a company that prides itself on running — not walking — to advance all goals and initiatives. However, the PMO function found that its organization found that its spreadsheet-based operations couldn't keep up with the company's commitment to speed. While the Excel-centric system was functional and clever, it had become a hindrance to Vitality's demands for greater speed and innovation. The company found that its system frequently collapsed under the enormous expectations, or as Head of Portfolio Change, Andy Foley put it, the system was maxed out from a technical perspective. As such, the Vitality team sought to find a PPM solution that could manage all of their PMO's projects and initiatives at a rapid pace while supporting their commitment to continuous improvement.

After a false start with a different PPM tool that didn't quite align with the company's needs, Vitality went back to the drawing board with a new understanding of what would and would not work. Through extensive research, the organization decided to partner with KeyedIn to implement software that would meet its advancing project and portfolio management needs.

# The Journey

KeyedIn worked with Vitality to determine the company's unique and quite specific requirements. Through interviews and a targeted Q&A process, KeyedIn was able to create a plan for providing Vitality with the best possible solution for its operation, supported by a 6-week onboarding process meant to streamline implementation and advance the continuing success of the PMO. The 6-week process included:

- Meetings with implementation consultants to support the success of the process
- Requirement and configuration workshops to prepare for implementation
- Nominating strategy champions in project management, resource management and portfolio management to rally user groups around the process
- Configuration
- User testing
- Continuous support
- Training
- Detailed manuals and materials

“KeyedIn offered us a very structured method of implementation. We found that it was a tried and proven approach and we are glad we followed it. KeyedIn played an important role in every step of the process, including go-live. It was fun and enjoyable and also a lot of hard work. Fortunately, we put a lot of attention on business-readiness activities like training, including informal drop-in training sessions.”

**Juliette Creed**  
Vitality's PMO Manager



# The Results

After onboarding the new PPM software, Vitality sprang into action by continuing to adapt to all of the new processes. While there were some challenges along the way, such as a need for post-implementation training refreshers and an increase in requests for support, the Vitality team was able to fully adopt the solution and begin leveraging it to achieve fast results. Today, the organization is able to operate in true Agile fashion, working in sprints, resourcing more effectively and focusing on continuous improvement.

Benefits include:

- Enhanced dashboard that standardizes reporting
- Easy allocation of teams and resources
- Increased access to information across teams and departments
- Improved engagement with stakeholders and key decision-makers
- Enhanced communication across teams worldwide
- Advanced tracking at a global level
- Accurate time tracking anytime, anywhere in the world
- Shift from 12-month planning methodology to a rolling planning methodology
- Improved resource management and capacity planning
- Scenario planning
- Advanced forecasting
- Better budgeting

Vitality and its PMO team have no intention at stopping at existing progress. Being forward thinkers who are dedicated to ongoing progress, they know the best is yet to come. As Juliette Creed, put it, “We’re very innovative at Vitality and we’re very forward-thinking with a focus on continuous improvement. KeyedIn are great partners for us in that respect.”

To hear from the Vitality team directly, you can watch this presentation, [A Year in the Life of KeyedIn](#).

## About KeyedIn™

KeyedIn is a supremely flexible solution for managing projects, programs and entire portfolios – from a single platform that provides a comprehensive view of the status of every project. Used by project managers, boardroom decision-makers, and frontline users, KeyedIn increases success rates and profit margins, enables better decisions about project selection, planning, and prioritization and optimizes resource usage across the entire business. Headquartered in Minneapolis, KeyedIn has hundreds of customers worldwide, including Walgreens Boots Alliance, LexisNexis and Office Depot.

**For more information, visit [www.keyedin.com](http://www.keyedin.com)**



Copyright © 2020 KeyedIn Solutions. All rights reserved.

### Corporate Headquarters

8500 Normandale Lake Blvd  
Suite 400  
Bloomington, MN 55437, USA  
**p +1 866 662 6820**

### EMEA Headquarters

Maple House  
Woodland Park  
West Yorkshire, BD19 6BW, UK  
**p +44 (0)1274 863300**

[www.keyedin.com](http://www.keyedin.com)