IBM ® **Business Partner**

Lumley General Insurance powers through business requirements with IBM® Rational® software tools

Overview

■ **The Challenge**

Lumley General Insurance (Lumley) was implementing a new insurance policy administration application and its IT department was swamped by thousands of requirements from business units. The project team needed to store and consolidate feature requests in a central place where it could group and accurately report on the requirements.

■ **The Solution**

Starting in June 2005, working with IBM® Business Partner† Solnet, Lumley built a comprehensive requirements tracking system using IBM Rational® ClearCase®, ClearQuest™ and RequisitePro™. IBM Rational ClearQuest provided a flexible workflow management tool for tracking defects and changes. The products were implemented, integrated and up and running within a month.

■ **Key Business Benefits**

Lumley now has a single, centralised source of information to track all the business requirements for its new application. At any point in time, the project team knows how many requirements it has, when they will be delivered and by whom. The team can accurately assess how much time it has taken to address each requirement, which encourages business units to set priorities. Lumley is now looking to expand its use of IBM Rational software tools to other projects.

SolNet Solutions

About Lumley General

Lumley General is one of New Zealand's leading insurers. It delivers products and services through independent brokers and has one of the largest insurance branch office networks in the country. It is one of three specialist financial services companies that comprise the Lumley Group, along with Lumley Finance and Lumley Services. Each company operates in a discrete market, but harnesses the combined capabilities of the Group to offer an unrivalled range of services.

Lumley is owned by Wesfarmers Limited, one of Australasia's largest and most successful public companies, which employs approximately 30,000 people and earned revenues of $8.2 billion in 2004–05.

A policy for 4,500 business requirements

Lumley General Insurance sells a wide range of commercial and personal insurance products through networks of independent brokers around the country.

While in the process of implementing a new policy administration application, Lumley's IT department found itself swamped by thousands of requirements from the various business units that would be using it. For example, some types of claims are managed by teams of claims handlers. These departments would submit requirements to allow groups of users to access and keep track of each other's work.

"Each business unit had specific needs and each of those needs translated to multiple features that the system had to provide," said Lynn Shrewsbury, Team Leader, IT, Lumley General. "Sometimes providing those features would require significant customisation of the system."

Requirements had been collected through the use of workshops and interviews, and then often clarified through email communications, but the development team had nowhere to store and consolidate these requests. Further complicating the situation, the application was being developed by an internal team working with a third-party provider. And while the application was being developed, the business was changing, resulting in a further need for new functionality and customisation.

"All in all we had 4,500 requirements that needed to be tracked," said Shrewsbury. "For each one, we needed to show who asked for it, whether it would be delivered internally or through our software development partner, how close it was to being completed and what issues we encountered along the way.

"For such a large number of requirements, we needed a very good solution. The ideal solution would also allow us to group the requirements and report on them to show our progress."

— Lynn Shrewsbury, Team Leader, IT, Lumley General

IBM Rational software tools easy to implement and integrate

In June 2005, Lumley started looking for an integrated technology solution that would help it manage the vast number of requirements.

"We already had IBM Rational Requisite Pro in the company, so the natural choice was to see if we could extend it to meet our needs," said Shrewsbury. "It also made sense to use tools from IBM that were already integrated with each other. Our parent company Wesfarmers was already using Rational tools and there was a strong push to share that knowledge with other companies in the group."

Lumley built a comprehensive requirements tracking system using IBM Rational ClearCase, ClearQuest and RequisitePro.

IBM Rational RequisitePro helped Lumley's development team clearly define and manage the thousands of requirements it needed to work through. The company used IBM Rational ClearCase to handle the software development lifecycle, with tools such as version control and build and release management. IBM

Rational ClearCase's support for parallel development teams helped Lumley's internal team and external provider work together. IBM Rational ClearQuest provided a flexible workflow management tool that tracked defects and changes.

Lumley found the IBM Rational tools quick and easy to implement. Within a month of starting, the products were implemented, integrated and up and running.

Control, reporting and a single source of truth

Lumley now has a single, centralised source of information to track all the business requirements for its new application, rather than a series of emails and other informal requests.

"Now we can tell at any point in time how many business requirements we have, when they will be delivered and how," said Shrewsbury. "We have an awful lot to achieve and this helps us make sure the developers focus their efforts on meeting business needs."

The IBM Rational tools have allowed Lumley to convert business requirements into a series of use cases, which can be tested against the current functionality of the software. Where the software doesn't match those needs, the development team can allocate resources to fixing the problem. The team can also account for the amount of time it spends addressing each requirement and report back to the business unit that requested it. This encourages the business units to set priorities so the software team can work on the most needed functionality.

Having successfully implemented the IBM Rational tools for this project, Lumley is now looking to use them across the whole IT department. The company is also looking at integrating IBM Rational software testing tools such as Functional Tester into the solution to automate the testing process and improve the quality of its software builds.

"The IBM Rational tools delivered everything we wanted from them. We had our own list of requirements for the solution; we knew exactly what we needed it to provide and that's what we got."
— Lynn Shrewsbury, Team Leader, IT, Lumley General

For further information

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