

## CASE STUDY

# Paper Rolls and Trojan Mice: How ValueOps Value Stream Management Helps the Insurance Giant Make Better Decisions

## Unum Group

### CLIENT PROFILE

Site: [www.unum.com](http://www.unum.com)

Industry: Insurance

Headquarters: Tennessee

Employees: 10,700

### CHALLENGE

How to evolve to a value stream management approach in a way that was embraced by everyone and minimized disruption.

### SOLUTION

From rolls of paper to dashboards, Unum turned ValueOps VSM to connect teams, work and funding across the enterprise.

### BENEFITS

While mini projects, so-called Trojan Mice, smoothed the way for change, teams now have a better understanding of the value they bring directly to customers.

## Business

Unum Group is the top disability insurer in both the United States and United Kingdom, also offering other insurance products including accident, critical illness and life insurance. It protects 39 million people worldwide and 182,000 UK and US businesses offer benefits provided by Unum.

## Challenge

Unum was looking to implement ValueOps Value Stream Management (VSM) by Broadcom<sup>®</sup> Software, but they were concerned that it could be disruptive to their business and face resistance from employees. They knew they had the right mechanical systems and processes to put ValueOps VSM in place, but they wanted to work to improve the dynamic and cultural elements around the people.

## Solution

Unum focused on making value streams more accessible to everyone. They decided to eliminate the jargon and help employees understand that value streams already existed—they just were not called that. For Unum, that meant starting with a customer's experience of walking into an emergency room and handing over their medical insurance card.

The customer's perception of value is what happens next—how they interact with the administration of their insurance and their ability to receive proper care. Against this context Unum started to document everything that happened to deliver that value, and they did it in a way that was easy for everyone to understand and interact with.

Barbara O'Connor, Director, Enterprise Agile Office, explains, "We produced two large rolls of paper and printed out screenshots for everything that happened, every screen that people interacted with. Then we attached those screenshots to the rolls of paper and connected them together." The full value flow spread across several areas of Unum's offices, but it created a clear visual representation of the flow.

People were able to collaborate and discuss, interacting with the value stream, identifying areas where there were duplication, or where things did not make sense. They were able to identify and correct errors, enhancing everyone's understanding of what was happening. They were able to eliminate some of the fear and uncertainty by making an unknown concept, value streams, relatable to everyone.

**“Customers expect things differently, and you have to focus on where the most value can be delivered—value streams deindustrialize how you think.”**



BARBARA O’CONNOR –  
DIRECTOR, ENTERPRISE AGILE  
OFFICE

## Solution (cont.)

But there is more to Unum’s approach than rolls of paper. They leveraged ValueOps VSM to track data and manage trends. O’Connor points out, “We’re heavily invested in dashboards, they’re great levelers of communication for us, removing ambiguity. Data drives all our decisions.”

O’Connor also said, “We originally planned to have stable teams, but we recognized early, through the data available to us, that unless there was a degree of turnover, teams would become stale. The ability to implement fresh thinking in our teams, and to help our people develop has given us a much more sustainable model.”

## Benefits

At Unum, ValueOps VSM allows people to make better decisions in less time. They do not try to focus on a single metric, but recognize that value streams are driving many improvements throughout the business. O’Connor said, “The quality of our conversations has changed, it is obvious everywhere from meeting to business cases.”

But perhaps the biggest benefit that O’Connor and her team were able to enable has been the way that change has been implemented and embraced within the company. “Rather than try to implement large scale change we broke our changes out into smaller pieces. We did not try to create a Trojan horse; we created many Trojan mice.”

The Trojan mice are busily at work across the organization working to make small adjustments to processes in one place, to change one or two elements of a screen somewhere else. None of them are large enough to disrupt how people work, but combined they fundamentally shift the business, without creating unease among the people affected by the changes.

“We don’t overcomplicate things,” said O’Connor. “Coherent actions are the elements of a value stream. If you can’t explain or document something then you don’t understand it so we spend more time assessing it.” By keeping it simple, and implementing changes in a way that they can easily be consumed, Unum, supported by ValueOps VSM, is driving value throughout their business.

For more information, please visit our site [VSMSummit.com](https://www.vsmsummit.com).