With the help of ITM Platform, Umivale Activa achieved seamless technology integration in the wake of a merger

Umivale Activa, emerged from the merger of Umivale and Activa Mutua in 2022

umivale Activa is the third largest Social Security-affiliated mutual insurance company in Spain.

The mission of **umivale Activa** is to offer occupational health coverage to policyholders by advising them on occupational risk prevention. They also offer tailor-made action plans to reduce accidents and absenteeism.

Its governing body comprises executives from companies such as BBVA, Iberdrola, Mercadona, and Banco Santander, among others.

Over a century in occupational health and safety management with more than 106,000 mutual companies and 214,700 self-employed professionals throughout Spain.

More than 1600 policyholders in the health sector, other services, and occupational health and safety.

122 centers, including hospitals, clinics, and administrative centers.

Some 1,500,000 workers covered across the country.

More than €1.8 billion in policies for contingencies, such as high-risk pregnancies, child care, and income protection for self-employed professionals who are unable to work.

Adhered to the UN Global Compact since 2013.

First Spanish company recognized with the EFQM 700 Seal of Excellence.

ITM Platform
PROJECTS • PROGRAMS • PORTFOLIO

The initial challenge: Achieve technological integration of both mutual insurance companies

The number one objective of the strategic plan is to merge companies. Previously, project management was supported by various different tools, which made it a challenge to track managerial issues.

The Project Management Office (PMO) needed a tool to manage the portfolio of technology projects and allow implementation of the PMO's strategic vision.

The **umi**vale Activa PMO

The PMO reports to the People and Technology Development Division to achieve cost-per-patient ratios that continue to place **umi**vale Activa among the best in the sector.

The PMO manages technology projects following an Excellence Model, which links the processes with the organization's objectives.

> I am delighted with the support, the continuous improvements in functionality and performance, and the support materials.
>
> **Juan Carlos Lombardía**
>
> Support Processes. Architecture and Systems

Both processes and strategic objectives are reflected in **ITM Platform** and mapped with projects and programs.

This allows for project progress, costs, and performance analysis from all perspectives, offering management an overview of the business vision.

Benefits and Results

Project alignment
By implementing **ITM Platform**, projects related to the strategic objective of integration were grouped into a single program.
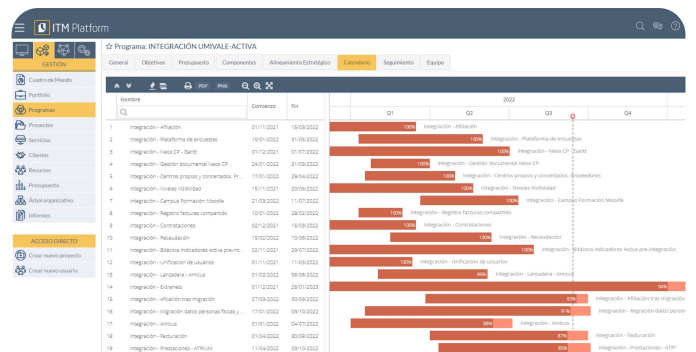
Integration calendar
By following the calendar the PMO had better oversight of the integration schedule.

Greater control over each project
With information centralized, the PMO could control the progress of projects and the achievement of established objectives.

Standardization of project management tool
ITM Platform allows managers to unify tasks, projects, resources, and time management within the same system.

Visibility of all projects

Before the implementation of ITM Platform, there were "clandestine" projects in the organization which did not have explicit approval and monitoring. Now all projects are visible, and their results are measurable.

Business perspective

Projects are directly mapped with the processes and objectives they serve, which makes it easier to prioritize those of greater importance.

Dashboards generated in ITM Platform are used to provide context and high-level information to management on the monitoring of strategic objectives.

> We assessed the technology systems of both Umivale and Activa Mutua. We decided to use the excellent project management office tool that Umivale had, to have global control and vision over the integration projects.

Control over planning

Yhanks to the centralization of the portfolio management, the PMO can program and schedule projects, avoiding overlaps and allowing for realistic planning.
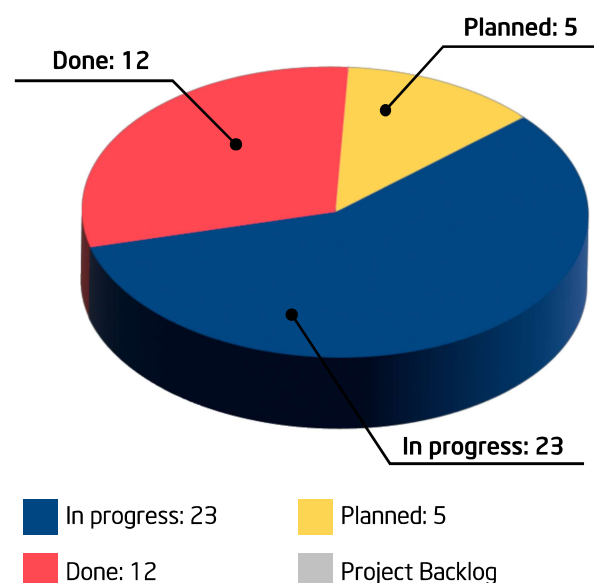
> The PMO is responsible for providing a global vision, ensuring that all participants update their projects and provide the board of directors with the most up to date information.

In addition, **ITM Platform** connects to Jira Software to integrate a particular set of projects organized by tasks.

Future Plans

The immediate goal is to improve the ability to estimate the use of time and resources.

Systematic analysis of differences between actual and projected efforts will lead to incremental improvements in the planning process.

Done: 12   Planned: 5

In progress: 23

- In progress: 23
- Done: 12
- Planned: 5
- Project Backlog

Next, umivale Activa plans to use the earned value metrics integrated into ITM Platform to monitor efficiency of resource utlization.

Conclusions / Benefits

Using ITM Platform, **umivale Activa** introduced a standardized tool to manage technology projects, achieving a global vision of the integration process.

umivale Activa

Visibility and portfolio planning in a complex technological integration

Real-time adjustment of integration projects

Effective management of suppliers, rates, and external personnel

Transparent, truthful, and timely information

Standardized management using centralized criteria and tools