

From transformation to triumph:

An Agile journey at scale

Executive summary

Optum Serve, the Federal Health Services entity of Optum® and UnitedHealth Group® (NYSE: UNH), partners with government entities like the Departments of Defense, Health and Human Services, and Veterans Affairs, driven by a mission to modernize the U.S. health system and improve citizens' well-being. As a partner of the Centers for Medicare and Medicaid Services (CMS), Optum Serve plays a crucial role in maintaining the CMS One Program Integrity system.

Optum Serve had adopted a waterfall model, delivering products through quarterly releases with a 3-month cycle. However, the sequential nature of this model, along with the extended wait period and frequent changes in requirements and development requests, highlighted its limitations in providing agility and supporting modernization efforts.

Recognizing the need to stay competitive amid dynamic trends and evolving customer demands, Optum Serve made the strategic decision to adopt the Scaled Agile Framework® (SAFe®). This methodology empowers Optum Serve to respond swiftly and effectively to changes, enhancing its ability to deliver value to clients and remain at the forefront of its industry. SAFe provides a structured approach to scaling agility across the organization, ensuring alignment with business goals and fostering continuous improvement.

However, this transformation wasn't without challenges. Skipping essential SAFe training and the lack of familiarity with modern Agile tools hindered adoption. There were instances of change resistance, and the hierarchical culture posed difficulties. A chaotic first Program Increment planning event highlighted the need for proper implementation of the SAFe implementation roadmap.

To assist in its transformation journey, Optum Serve brought in Lean-Agile transformation leader and Scaled Agile, Inc. Gold Partner, KnowledgeHut. With KnowledgeHut's guidance, Optum Serve made the strategic decision to introduce SAFe to a group that was entirely new to Lean-Agile concepts.



“SAFe proved to be the catalyst for agility, visibility and transparency, seamlessly integrating our initiatives, ensuring predictable deliveries and consistently meeting our timelines.”

— Amanda Warfield
Vice President, Program Integrity, Optum Serve

The strong foundation laid through SAFe training, cultural shifts and systematic approaches allowed Optum Serve to tackle complexity, foster collaboration, and enhance project outcomes. By adopting SAFe best practices and principles it promoted a culture of agility and introduced Scrum and Kanban methodologies. Key results ensured alignment with customer objectives, and the use of enterprise tools like Jira, Confluence, TestRail and Miro facilitated efficient collaboration and documentation.

The Optum Serve case study highlights remarkable successes resulting from its adoption of SAFe. Through this transformation, Optum Serve achieved enhanced team motivation, a substantial increase in the delivery of change requests and a noteworthy reduction in bugs by 55%. These wins were accompanied by heightened productivity and improved business agility, enabling Optum Serve to swiftly respond to customer needs and drive digital transformation.

Key takeaways from this journey underscore the pivotal role of leadership commitment, the value of Agile coaches and the importance of fostering collaborative workspaces. Additionally, the case study emphasizes the benefits of creating a sense of urgency, engaging employees and starting with Essential SAFe® for streamlined beginnings. The Optum Serve success story serves as an inspiring model for organizations aiming to embrace Agile methodologies and realize transformative outcomes.



55%

denial reduction
through improved
registration accuracy

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