

## How Guardian Life manages change

By **Stephanie Sanborn**

The old cliché says that the only constant is change — and for Guardian Life, managing the ongoing changes to its applications and systems is critical.

"We're looking to streamline change management, coordinate enterprise change, and control it," explains Tom Mannix, director of corporate online systems for the New York-based mutual life insurance company.

Like many industries, the insurance industry is now offering a wider array of services than in the past, and often looking to leverage the Web and other technologies in its expansion. But managing the changes in business and technology needs often poses a challenge that can't be ignored.

At Guardian, change management is not a new concept; the company first brought in a change management solution from San Mateo, Calif.-based Serena Software for its mainframe production applications in 1997.

But over time, Guardian's applications grew more distributed — from about a dozen distributed apps in January of 2000 to more than 25 by January 2001, to more than 100 and growing today, explains Mannix — and the user community was beginning to express concern about change management issues. So Guardian's CIO "basically asked me to do for our distributed platforms what we had done on the mainframe," says Mannix.

"[In] enterprise change management, where an increasing number of applications are Web-developed or distributed but require access to and coordination with mainframe programs, then the changes that take place on one side have to be correlated to the other side," explains Mannix.

Coincidentally, Guardian was also starting a strategic sourcing initiative, which Mannix says gave them the chance to bring in and compare change management solutions for the distributed applications. One top requirement is that the solution would have to either interface with the existing mainframe change management solution or completely replace it, due to the need for tight communication between the two platforms.

"To bring in a different solution for distributed [applications] and spend the rest of my working life here saying, 'Is it your fault or the other guy's fault?' is something we did not want to do," adds Mannix.

After narrowing down their choices, Guardian ended up choosing Serena's ChangeMan DS and Enterprise Change Portal. Not only would it work with the ChangeMan ZMF mainframe solution, but Guardian was able to benefit from its previous experience and familiarity with ChangeMan, meaning an easier learning curve for the new project.

"The ever-increasing rate of business changes to both legacy and dis-

tributed applications mandates concurrent development," adds Mannix. "Serena Enterprise solutions position us for this type of growth."

The distributed applications at Guardian span the business; for example, one app is a proposal system deployed at 50 of Guardian's sales offices which gets upgrades at least once a month. But distributed applications also present some issues of their own.

"Unlike the mainframe where you build something, put it into production, and just change it to death over the next 30 years, in the distributed world applications are much smaller, much more compact," says Mannix. "They do a specific function, and if business changes that function may no longer be required."

Although the work on the distributed applications has just begun, with work on seven applications currently in progress and three applications under the ChangeMan DS system, Mannix foresees having all 100-plus applications on board by the middle to end of next year. In the long term, he expects the number of distributed apps to "far exceed" the number of mainframe applications because it is "the nature of the way business is going with more and more development of the distributed side and the Web."

### Corralling change

Aside from handling the continually growing number of distributed applications, Mannix says another challenge lies in addressing cultural changes. Although mainframe application programmers have been dealing with change control for years, it is a newer concept to some distributed application programmers who are more like "a hundred gun-slingers at the OK Corral — they make changes when they want, where they want, why they want it," says Mannix. But the applications do have an effect on the network, firewalls, and infrastructure resources, and that effect could be disastrous if changes are not managed and controlled.

In the end, says Mannix, it comes down to "the three Cs: communication, cooperation, and coordination." The change management solutions help streamline the ongoing flow of business and tech changes, but the developers and business users still need to communicate to coordinate their efforts.

"It's business continuity, it's quality assurance, it's project management," says Mannix. "And that's really where we're heading — to try and get [this] point across to someone who's making a change: What is the impact? Not just to [you], but to the whole corporation. There's a domino effect."

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