

**ALLSTATE’S JOINT REPORT CARD ON IT/BUSINESS PARTNER  
RELATIONSHIPS**

Madeline Weiss, Program Director, APC

<p><b>Patricia Coffey</b> <b>VP Distribution, Marketing and Enterprise Applications in Allstate Insurance Company’s Protection Technology Organization</b></p> <ul style="list-style-type: none"><li>• Heads a team of approximately 1,000 IT resources.</li><li>• One of Computerworld’s Premier 100 IT leaders in 2004.</li><li>• Received an MBA in Marketing and Finance from the University of Illinois.</li></ul>	<p><b>The Allstate Corporation</b></p> <ul style="list-style-type: none"><li>• The nation’s largest publicly held personal lines insurer, providing insurance products to more than 17 million households</li><li>• Founded in 1931 as part of Sears, Roebuck &amp; Co. and became a publicly traded company in 1993</li><li>• Headquarters: Northbrook, Illinois</li><li>• 2006 revenues: \$35.8 billion</li><li>• Encompasses more than 70,000 professionals</li></ul>
---	--

Successful IT executives know that delivering cost-effective, high quality and reliable IT products and services requires close collaboration with business partners. Creating and sustaining the trusting and strong relationships with colleagues that enable such close collaboration and influence are critical to success. Pat Coffey, Vice President at Allstate Insurance and a long-standing APC member, recently shared the unique practice that she established for assessing her IT organization’s success in becoming that trusted partner.

Before conducting the assessment, Pat’s team worked with their business partners to define the characteristics of successful IT relationships. Their behaviors and attitudes can be characterized as trusting, credible, displaying a sense of urgency, proactive, and collaborative. They display technology leadership, benchmarking against industry standards, and developing solution alternatives. And they demonstrate execution excellence -- meeting commitments; quickly assessing ideas; setting mutually agreed quantifiable objectives; managing, mitigating and communicating risks; and communicating in a timely and full fashion.

After exploring other company’s assessment practices, she rejected more usual survey formats, instead choosing to pilot business partner reviews (BPRs). Each review consists of a discussion among partners (i.e., Pat held a discussion with the appropriate business executive and each of her managers conducted a similar discussion with his business counterparts) to assess how well the partnership measures up on the defined characteristics of successful partners (behaviors and attitudes, technology leadership and

---

<sup>1</sup> This is the second in a series of columns from the SIM Advanced Practices Council, an exclusive forum for senior IT executives who value directing and applying pragmatic research; exploring emerging IT issues in depth; and learning different, global perspectives from colleagues in other industries.

execution excellence). At each face-to-face 90 minute discussion, partners address the following 10 questions:

#### Behaviors and Attitudes

1. Do we (business and IT) build trust and credibility to strengthen the partnership?
2. Do we (business and IT) effectively collaborate, sharing information, resources and expertise to accomplish our objectives?
3. Do we (business and IT) display a “can do” attitude, sense of urgency, inclusion and flexibility?

#### Technology Leadership

4. Does IT envision alternatives and introduce ideas that meet the needs of the business?
5. Does IT demonstrate and apply insight into leading-edge technologies?

#### Execution Excellence

6. Do we (business and IT) assume joint accountability for arriving at solutions that meet both our needs?
7. Do we (business and IT) define the best mix of capability, cost and schedule to maximize the value to the business?
8. Do we (business and IT) appropriately staff our projects, using the right people, with the right skills at the right level?
9. Do we (business and IT) communicate relevant issues, with appropriate advance notice and adequate information given?
10. Do we (business and IT) meet our project commitments with regard to scope, schedule and budget?

For each question, the partners were asked to agree upon a numeric rating from 1 (minimally demonstrates these actions or demonstrates early evidence of these actions) to 5 (consistently demonstrates and applies the actions described well beyond what is expected; raises the performance of the organization through demonstration of these actions). In order to achieve an agreed numeric rating, partners had to get beyond superficial pleasantries to give each other feedback and honestly assess what was working well and what wasn't, thereby strengthening their relationships. Pat observed that the discussions have heightened the realization that both parties must be effective to ensure success and have increased the motivation to work together to solve problems.

Ratings by each set of partners were then averaged across the discussions on each question and reported as a baseline for future comparison. Since the pilot was deemed very successful, the process will be followed annually.