

The Principal Financial Group

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DREW VAN MEETEREN
Product Director,
Principal Wellness Company

ORGANIZATION

The Principal Financial Group® (The Principal®) is a leading global financial company offering businesses, individuals and institutional clients a wide range of financial products and services. Its array of products and services includes retirement solutions, insurance, wellness programs, and investment and banking products through its diverse family of financial services companies and national network of financial professionals. The Principal Financial Group received the highest numerical Equity Score among Investment brands included in the 2011 Harris Poll EquiTrend® Study.

CHALLENGE

Principal Wellness Company, a subdivision of the Principal Financial Group, was searching for a portal that would enable its business to offer a new and attractive product for its customers. The single portal infrastructure needed to have the ability to host multiple, branded wellness portals for each of its clients, while also providing a personalized user experience to the wellness program participants. Furthermore, the functionality of tracking participation in activities would be a key selling feature.

RESOLUTION

Initial searches proved unsuccessful, as many out-of-the-box portal products offered on the market were not able to meet these standards. With assistance from Xtiva, the company eventually decided Liferay Portal would serve as the right platform.

Xtiva worked jointly with the Principal Wellness Company's IT and business teams in a phased approach, leveraging Agile development methodologies to deliver a solution

that met the client's needs. The solution involved extensive customization of core Liferay functionality, custom portlet development, themes and layouts, custom security module and SOA-based integration with other distributed and mainframe applications.

Some key project highlights include custom portlets for managing wellness programs as well as for participants to perform activities and track progress toward incentives. Another highlight is a custom personalization solution based on a rules language and engine that involves creation of dynamic user collections using over 100 profile attributes that are aggregated from different systems into a staging datastore. These user collections can be used to drive personalized content, mass emails, forms or surveys, and other artifacts to wellness portal users.

The implementation has resulted in several great benefits. The build out and on-ramping of new client wellness portals is efficient and can be done entirely by the operations team without IT support. Frequent releases with incremental functionality also increased time-to-market. Furthermore, Principal Wellness was able to reduce some costs from the elimination of printed materials.

Xtivia's team delivered on a very challenging timeline with a 4-6 week production release cycle with each release providing incremental value for Xtivia's client and its customers. "With Liferay and the XTIVIA solution, Principal Wellness Company has been able to increase our client-branded, website creation efficiencies," said Drew Van Meeteren, Product Director at Principal Wellness Company. "We can now better offer our clients customized branding options in a shorter amount of time." Performance testing has proven Liferay's capability to meet the client's needs, and Xtivia continues to support this project with ongoing production support, enhancement implementations, and performance tuning.