



Sample Case Studies

Business Requirements Consolidation

Background

The corporate underwriting department of a leading US personal lines carrier was in the process of implementing a homeowner development program. Lack of a cohesive strategic plan resulted in the proliferation of a number of independent but overlapping projects that were in various stages of definition and implementation. New upper management had been brought in to strengthen the underwriting focus of the company.

Engagement

CastleBay was retained to:

- ✓ Provide assistance in creating a Homeowner Development Program project charter and plan.
- ✓ Facilitate documentation of business requirements.
- ✓ Provide assistance with identifying and evaluating operational solutions.

Results

Client management was presented with a written report that:

- ✓ Assimilated information that was scattered vertically and horizontally within the home and field operations into one succinct document.
- ✓ Facilitated clarification of business requirements which:
 - ◆ Identified major gaps in underwriting strategy.
 - ◆ Articulated alternative business and systems solutions.
 - ◆ And helped focus on strategic underwriting issues.
- ✓ Re-baselined one critical component for systems cost benefit analysis.
- ✓ Included a high-level action plan outlining project components and dependencies. A full project plan was determined to be premature in the absence of a defined homeowner underwriting strategy.

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