



Sample Case Studies

Fast Track Administration System Package Evaluation

Background

The Canadian subsidiary of a global P&C insurance group was engaged in the review of an Administration system that had been adopted as a group standard. This vendor software package was at the point of being installed for an evaluation phase. However, no evaluation team had been formed and no evaluation criteria had been defined.

Engagement

CastleBay:

- ✓ Met initially with the CIO, SVP of Underwriting and other Senior Management to frame major issues
- ✓ After two lengthy working session, proposed a focused 12 week software review and project scoping exercise
- ✓ This exercise, which was planned and led by CastleBay included the:
 - ◆ identification of major team roles and skill sets
 - ◆ definition of critical functional requirements and evaluation criteria
 - ◆ structured review of the Administration system's major functional components
 - ◆ documented findings and proposal

Results

Client management was presented with a written report that:

- ✓ Provided a high-level functional gap analysis.
- ✓ Proposed alternatives to deal with significant gaps.
- ✓ Outlined major tasks, timescale and costs of a phased implementation.
- ✓ Included a high-level Project Plan for the implementation.
- ✓ Included a draft statement of options should the client choose an alternative route

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