



# Sample Case Studies

## Legacy Systems Consolidation and Data Conversion

### Background

A national personal lines carrier had recently acquired a new member company and the decision was made to consolidate that carrier's policy, statistical and claims data onto the acquiring company's in-house legacy systems.

### Engagement

#### **CastleBay was retained to:**

- ✓ Plan and execute the overall data transfer
- ✓ Design and oversee the implementation and testing of data extract, transformation and loading for policy and statistical reporting
- ✓ Gather business requirements and facilitate agreement between the business user groups as to product changes which would be made during the conversion
- ✓ Design and implement the "on renewal" conversion

### Results

The overall conversion and consolidation was achieved on schedule::

- ✓ ETL tool selection, training and execution was successfully integrated into the project timeline allowing the client to gain expertise which would be valuable for subsequent projects
- ✓ The conversion process was an 80/20 which required only minimal manual intervention on a subset of policies following automated conversion
- ✓ Converted data was merged seamlessly with client data for statistical reporting and data warehousing

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