



# Sample Case Studies

## Package Selection & Legacy Replacement

### Background

A regional, personal lines insurer was hampered in its growth plans by an unfavorable long term outsourcing agreement which stifled product and process change and was experienced as unresponsive and costly. The new CEO made it a top priority for the company to replace the core insurance administration systems – underwriting, policy, claims, billing and agency submissions in order to support agreed corporate growth plans.

### Engagement

CastleBay was retained to lead the software selection and acquisition project. This took place in the spring and summer of 2007 and involved::

- ✓ Formulation management of a client team that represented all major stakeholders
- ✓ Gathering of business requirements and construction of an RFP
- ✓ Market analysis and proposal of vendor shortlist
- ✓ Execution of “scripted demos”, vendor and client reference visits
- ✓ Selection of vendor and negotiation of license software and implementation services agreements.

Following successful completion of the vendor selection the client asked CastleBay to run the legacy replacement project. This entailed:

- ✓ Development and monitoring of both program level and project specific task plans
- ✓ Management of both CastleBay and client resources
- ✓ Vendor management – both the new vendor and legacy vendor
- ✓ Management and hands on activities in the business requirements definition, QA planning and testing and integration validation.

### Results

The following results were achieved:

- ✓ The first line of business - Homeowners went live for new business on schedule in the spring of 2008
- ✓ The second line of business – Automobile went live for new business on schedule at the end of June 2008.
- ✓ Rollout and in-force conversion have commenced as planned