



Case Study

Accelerating Cloud Migration for a Leading Multinational Insurance Company

SmarTek²¹

Executive Summary

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A leading multinational insurance provider faced delays in its cloud-first initiative and challenges in migrating a complex SharePoint environment. They sought expertise to drive a comprehensive cloud migration. Through a phased approach and meticulous attention to data security and compliance, the project successfully migrated 75+ business units and applications, resulting in \$3.6 million in cost savings and a robust, scalable cloud infrastructure. This transformation resolved immediate operational hurdles and laid the groundwork for future digital innovation and agility.



Background and context

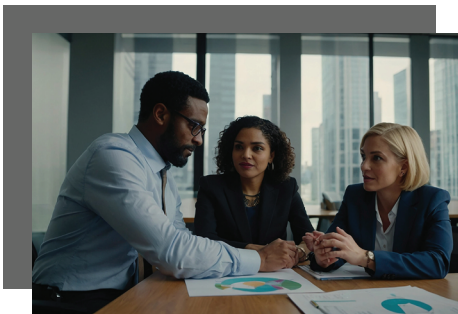
In an industry where digital transformation is key to staying competitive, the client had initiated a cloud-first strategy to modernize its IT infrastructure, enhance operational efficiency, and improve customer service. The goal was to migrate over 75 business units and applications to the cloud, but the task's complexity and the current vendor's limitations had caused significant delays. This project was more than just a technical upgrade; it was a strategic move to position the company for long-term success in a digital-first world.

The complexity and scope of the project presented multiple layers of challenges



Intricate SharePoint Migration

The client's SharePoint environment was deeply integrated with their operations, making migrating to Office 365 complex and risky. Code refactoring for cloud compatibility was essential and required specialized expertise.



Legacy Infrastructure Decommissioning

With over 500 legacy servers in use, transitioning to the cloud required a careful strategy to decommission outdated systems without disrupting business continuity.



Operational Disruption and Continuity

It was critical to ensure that the migration did not interfere with ongoing operations, especially given the real-time nature of many client services.



Data Security and Regulatory

As a provider handling sensitive customer data, the client must ensure that the migration adheres to strict data security protocols and comply with industry regulations.



The approach to this complex migration was systematic, secure, and collaborative

1

Phased Migration Strategy

To ensure a seamless transition, a three-phase migration strategy was implemented. This included an initial assessment and planning phase, followed by the execution phase, where applications and data were carefully migrated, and finally, an optimization phase to refine and enhance performance post-migration.

2

Advanced Code Refactoring and Compatibility Checks

Close collaboration with the client's internal teams to refactor code and ensure compatibility with cloud-native services. This process involved updating and optimizing applications to leverage the Office 365 environment's capabilities fully.

3

Secure Decommissioning of Legacy Systems

The new system was designed with the flexibility to effectively manage commissions across all sales channels—retail, care, and dealer networks. This unified approach ensured consistency in commission calculations and provided a single source of truth for all sales performance data.

4

Data Security and Compliance Best Practices

Robust security measures, including data encryption and secure data transfer protocols, were integrated to protect sensitive customer information during the migration. Full compliance with regulatory standards was ensured.

5

Enhanced Digital Integration

In addition to the core migration, a broker portal integrated multiple insurance plans. This unified platform allowed brokers to cross-sell and manage plans more effectively, enhancing customer service and operational efficiency.

The results of the migration were transformative, delivering both immediate and long-term benefits

1 Significant Cost Savings and Efficiency

Decommissioning 500+ legacy servers resulted in \$3.6 million in annual cost savings, drastically reducing maintenance expenses and improving operational efficiency.

2 Accelerated Digital Transformation

Successfully migrated over 75 business units and applications, positioning the client to fully utilize the scalability, security, and agility of a cloud-first infrastructure.

3 Enhanced Data Security and Compliance

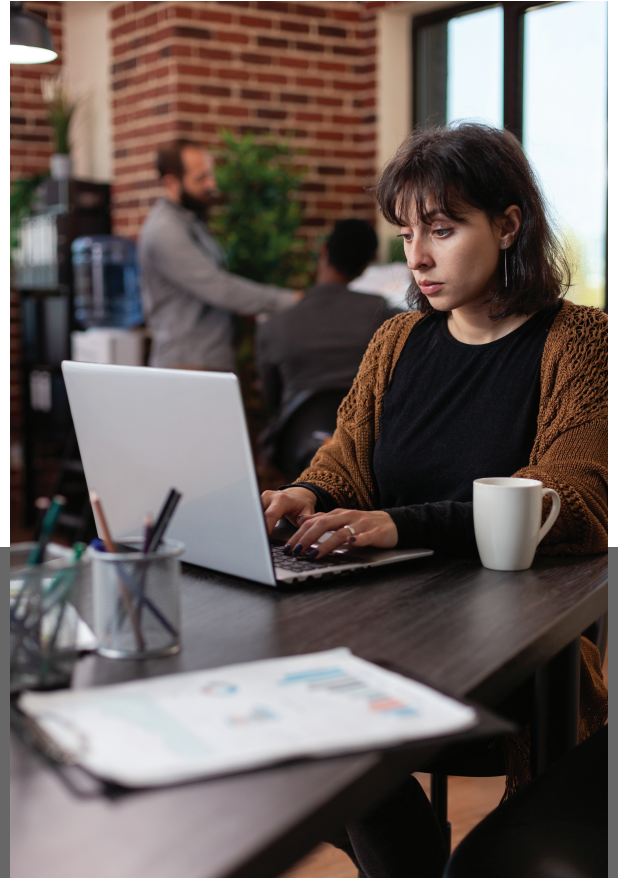
By implementing advanced security protocols and ensuring compliance with industry regulations, sensitive customer data was protected, mitigating the risks associated with cloud migration.

4 Operational Agility and Improved Performance

The new cloud-based infrastructure provided a more responsive and adaptable IT environment, reducing the time required for system updates and feature deployments.

5 Strategic Enablement

Beyond the immediate operational improvements, the migration empowered the client to innovate and expand its digital offerings, laying the foundation for future growth and enhancing its competitive positioning in the insurance market.



Cloud migration has provided the client a solid foundation for continued digital transformation. With a modern, scalable, and secure cloud infrastructure, they are poised to explore new digital opportunities, enhance customer experiences, and drive innovation across their business units. The expertise in managing complex migrations and ensuring seamless operational continuity has addressed the client's immediate challenges and positioned them for long-term success in the digital era.

Looking forward, the client is well-positioned to leverage its new cloud infrastructure to implement advanced analytics, artificial intelligence, and machine learning capabilities. These technologies could further enhance the client's ability to assess risk, personalize customer experiences, and streamline operations. The successful migration has also opened up possibilities for more agile development practices, potentially accelerating the client's ability to bring new products and services to market.

The relationship established through this project has laid the groundwork for ongoing collaboration, with potential future projects focusing on further digital innovations and operational improvements.

Client Collaboration and Feedback

The success of this project was built on a foundation of collaboration and open communication. The team engaged closely with the client's leadership and technical teams, incorporating their insights and feedback into the migration strategy. This collaborative approach was crucial in navigating the complexities of the project and ensuring that the solution met the client's specific needs. For instance, the development of the broker portal was heavily influenced by direct input from the client's sales teams, ensuring that the end solution was tailored to meet their specific needs and operational workflows.

