



INTRODUCTION AND ROLLOUT SALES PLATFORM INSURANCE GROUP

REPLACEMENT OF AN OLD SYSTEM AND ROLLOUT OF THE NEW SALES PLATFORM FOR THE ENTIRE INSURANCE FIELD SERVICE

An insurance group in North Rhine-Westphalia was challenged with the task of replacing the outdated and decentralized sales platform of all the approximately 460 agencies and savings banks in North Rhine-Westphalia with a centralized and modern cloud solution. This required preparing the data for the central system and preparing all agency employees for the new connections.

PROPOSED SOLUTION

Analysis of the environment and interfaces. Identification of weak points and replacement by new rollout systems. Examination in rollout management through constant monitoring, sensitization of stakeholders and promotion of acceptance. Integration of the distribution system into the existing structures.

RESULTS

Modernization of the sales solution for more transparency and better communication. Agility through rollout reporting structures. Functional implementation of the intuitive systems.

REPLACEMENT OF AN OLD SYSTEM AND ROLLOUT OF THE NEW SALES PLATFORM FOR THE ENTIRE INSURANCE FIELD SERVICE

The distribution of more than 460 agencies and savings banks in North Rhine-Westphalia meant that one of the largest projects was pending for an insurance group. The service-based and de-centralized sales platforms had to be replaced by a central and modern cloud solution. After more than 19 years of intensive use, the previous solution was no longer up to date, which made it necessary to convert to new system solutions. This required a migration of the existing data to the central system, which had to be completely prepared in advance. It was also necessary to absolve some further training for the employees in order to gather the necessary knowledge for the handling and control of the more innovative system solutions.

MANY PROBLEMS CAUSED BY MISSING ACCEPTANCE

One of the biggest problems here was the long-standing dependency of the legacy systems, which had been used by all agencies of the insurance group for more than 19 years. Daily operations and the associated utilization of the systems proved to be an increasingly major problem, for that reason there was only a very short period of time available for preparation for the system changeover.

The planning therefore had to fit exactly into the available time and budget framework in order to avoid the risks of business obstruction and loss of earnings.

Thus, the additional challenge emerged to prepare the innovations and improvements of the new systems in an understandable and interesting way in order to eliminate the negative basic attitude of the staff. The biggest task in this respect was to revise the rumors that had arisen and to ensure the necessary openness and acceptance through agile project management.

In order to improve this acceptance around the system change and to integrate the new cloud solution into the insurance agency, EVOSULT was assigned to analyze the existing situation, to carry out the stakeholder management and to take over the rollout implementation. This was recommended by the management of a public Bavarian insurance company.

THE MODERN SOLUTION FOR THE INSURANCE FIELD SERVICE

To connect the technically successful implementation with a change of mind of the participants, the analysis of the environment and the involvement of the stakeholders was started. Without a positive link between people and technology, identification with the existing Group processes could not succeed. For this purpose, the weaknesses of the previous implementation had to be analysed first in order to obtain a basis for the further system procedure.

Consequently, the planning of a full-fledged rollout began in order to be able to optimize the existing processes within a pilot phase. By improving the group interfaces in support, new approaches were developed for the employees to better understand





the structures within the change management and to gain more acceptance. This was made possible by numerous events to inform employees about the upcoming rollout processes and the resulting opportunities.

By setting up a special coordination team, the approximately 440 agencies were supported during the 12-week preparation phase of the introduction and adjusted to the developments within stakeholder management. With constant reporting and a fully-fledged rollout management system, the technical solutions were launched without resistance - and people were put in the focus. With the help of a comprehensive cooperation between agency, service provider and project team, it was thus possible to successfully hand over the project to the line and to optimize communication in a targeted manner.

A GOOD STEP TOWARDS A MORE MODERN FUTURE

As a result of early rollout planning, it was possible to support on this basis the various agencies with a validatable process and to ensure targeted preparation. The automated rollout reporting system of EVOSULT provided the necessary transparency to strengthen the cross-agency acceptance for the project.

With the necessary experience, it was possible to optimize the rollout planning and to rely on a sustainable and well-thought-out communication strategy. In combination with a modern stakeholder management, enthusiasm for the new systems was fostered in order to emphasize the newly created added value through agile project management and to focus on people.

Caused by the support of the EVOSULT rollout team a contribution could be made to the smooth and trouble-free rollout process, which was able to run according to the planned budget and time frame. Without full sensitisation the employees would not have accepted the project. The EVOSULT team provided the necessary trust and acceptance to enable a modern and more efficient future.

ABOUT EVOSULT

EVOSULT is specialized in implementation and rollout projects in medium-sized companies up to multinational corporations. We rely on classical as well as agile approaches in project management. In particular we keep the human factor in the centre of the implementation. EVOSULT's experience in business consulting shows that the transformation in companies is the more successful the more comprehensively all parties involved are involved in the changes.

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