

Overview

A nationally recognized insurance company received PE backing to facilitate rapid growth through mergers & acquisitions. The company faced challenges integrating new systems, processes, and resources to support the growth. SteelBridge was selected by the PE manager to lead the implementation of a core recordkeeping software system, allowing efficient acquisition integration onto a single, unified platform.

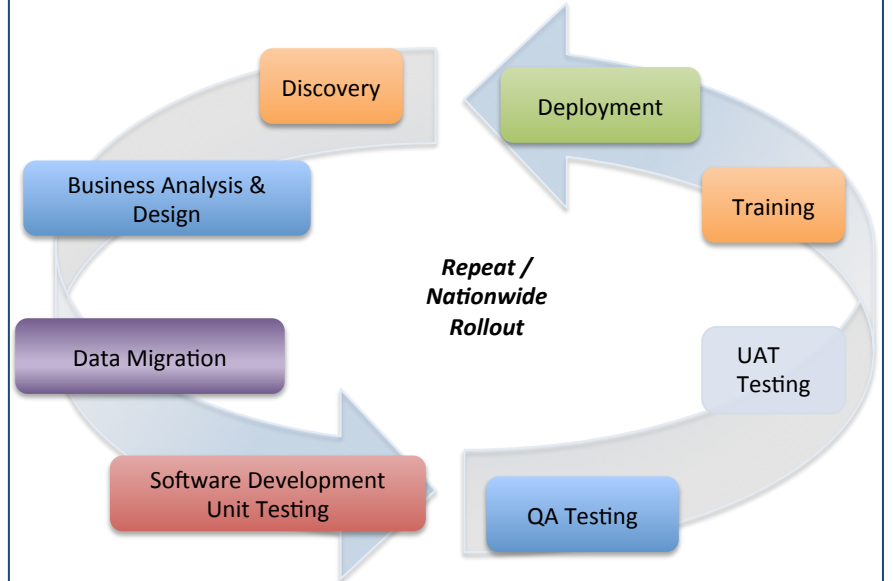
Client Challenge

- Existing core agency management system was not scalable and built on outdated technology
- Back-office operations were highly segregated due to the different systems inherited from acquisitions
- Marketing was unable to track critical campaign management information
- The company was spread geographically across the country with multiple corporate and back-office locations, and more than 1,000 retail stores

SteelBridge Impact

- Defined strategic plan to allow company to achieve growth objectives
- Defined nationwide software deployment office onboarding approach
- Led business analysis and requirements gathering for system selection and customization
- Designed current vs. future-state process diagrams to facilitate functional gap analysis
- Developed and executed test scripts and led testing efforts for deployment of software releases
- Defined a multiyear project management schedule that layered the project in company staff business as usual functions
- Prepared and presented quarterly updates to the Steering Committee and company CEO
- Managed implementation team and coordinated hundreds of resources across locations
- Deployed new system across 1,000+ locations in 17 states at project completion

Project Approach



Deployment Timeline

1. Strategic Review, Technology Assessment & Readiness
2. Business Analysis, Requirements Gathering, Project Management
3. Outsourced Agile Development and Deployment Strategy
4. Conference Room Pilot to Prove Application Fit
5. Nationwide Implementation and Integration Phase

Contact Us

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