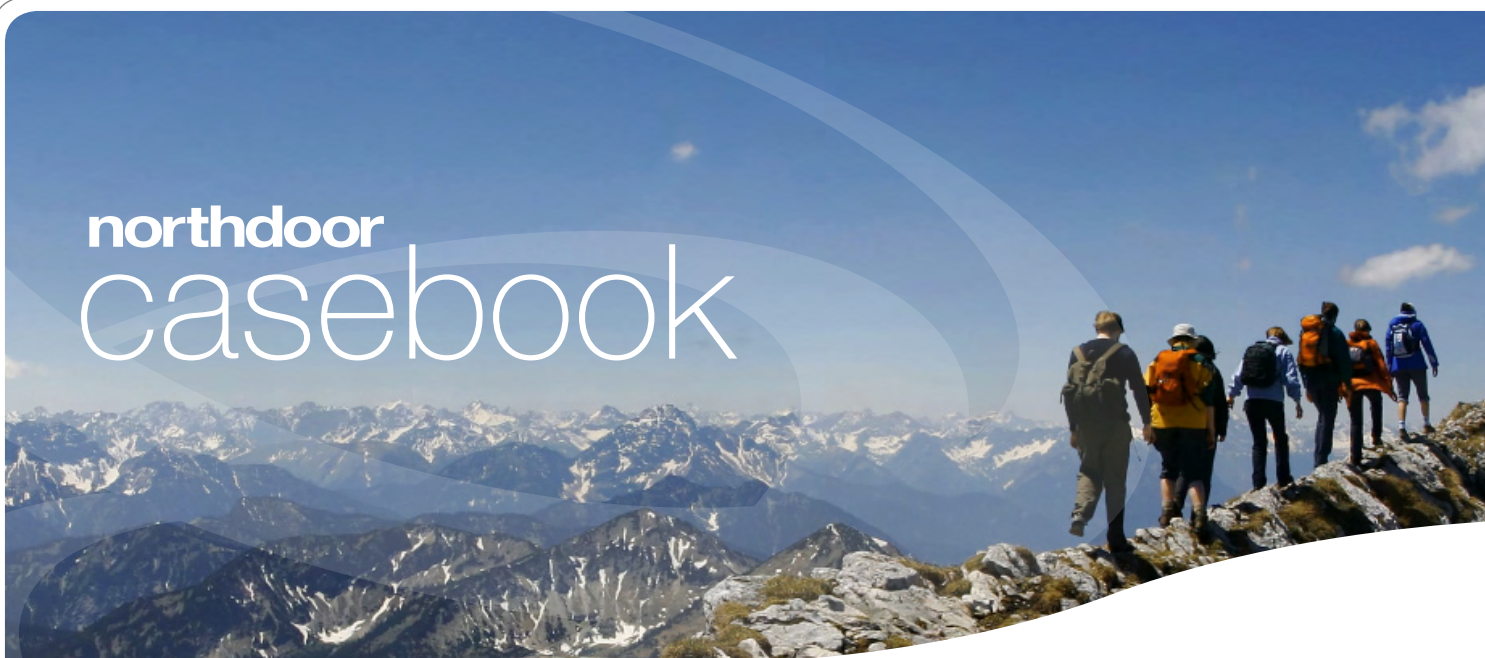


# northdoor casebook



## *Northdoor ensures risk free data migration at Canada Life*


*Achieving cost synergies through the consolidation of back office operations is a major business driver behind many of today's mergers and acquisitions. However, the task of migrating vast amounts of customer data from one business critical system to another places special demands on already stretched IT departments. And the risk of failure is always high.*

This is especially true of the highly competitive insurance industry. Administrative problems or delays caused by even simple system failures can have a direct impact on customer loyalty, and can cause lasting damage to reputations that have been established over many years. So with the highly publicized purchase of Royal & Sun Alliance's (R&SA) Group Risk business, Canada Life's senior management knew that they would need a trusted IT partner to ensure success. As the UK market leader for group life and number two for group income protection, and as part of a global group with some £75 billion of assets under administration, failure was not an option.

With the help of Northdoor plc – the City of London based IT specialists – Canada Life's 'Western Sunrise' migration project was achieved within the agreed time scale and delivered significantly under budget. Equally importantly, customers remained blissfully unaware that it had taken place at all.

*'Northdoor provide 24/7 support for GALAHAD via their excellent ManageLine service.'*





*“Northdoor... have constantly proved themselves by always delivering on time and to budget.”*

*Sue Dobson, Project Manager*

### *Ushering in a new dawn at Canada Life*

To fully realize the synergies of the R&SA acquisition, Tom Corcoran – Managing Director at Canada Life’s Group Insurance Division – knew that a “single footprint” service platform strategy would be needed. This approach would not only deliver significant cost savings by reducing infrastructure and administrative overheads, but would also aid brand loyalty initiatives by ensuring Canada Life was able to provide new and existing customers with a seamless, efficient and professional service. So, one of the first tasks was for Canada Life’s Western Sunrise team to assess which of the existing administration and claims processing systems to adopt. A cost benefit analysis was carried out and a clear leader emerged.

Prior to their acquisition, Royal Sun Alliance had used a combination of two systems based around Oracle, DataEase and Access, which was felt to be a needlessly complex and costly approach. In contrast, Canada Life’s single, unified system – GALAHAD – was able to deliver a sophisticated yet low-cost solution to customers and clients, as the analysis was able to prove.

### *When two become one*

Having established the best platform to take forward, the next stage was to conduct a feasibility study. This examined, in exhaustive detail, the available options and risks associated with migrating policy information from R&SA’s Graphic and Pulsar systems onto GALAHAD. It was at this stage that Northdoor plc became involved in the project as Sue Dobson, Western Sunrise Migration

Sue Dobson, Project Manager, explains.


‘Having worked with us to develop GALAHAD some years previously, Northdoor had been able to gain a real understanding of our business, our processes and the industry in which we operate. Northdoor also provide 24/7 support for GALAHAD via their excellent ManageLine service, so they were aware of current issues affecting our business. All this meant they were the obvious choice to conduct the feasibility study.

‘However, given the complexity and level of risk involved, we needed to be certain that we selected the right partner for the migration process itself. Once again, Northdoor were able to demonstrate their technical awareness and prove their competitiveness during an open, three

*‘Northdoor were able to demonstrate their technical awareness and prove their competitiveness during an open, three way tender process.’*

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*Sue Dobson, Project Manager*

way tender process. To be honest, we weren't surprised as they have constantly proved themselves by always delivering on time and to budget.

'Added to this was the broad expertise Northdoor were able to bring to the project, a vital factor given the different technological platforms the systems used.'

Northdoor's feasibility study had established that over 90% of R&SA's policy data could be migrated to GALAHAD using fully automated and repeatable processes. The next stage was to set out in detail how this would be achieved.

### *Open working partnership encourages innovation and delivers results*

As with all successful projects, the development of an open and honest relationship would prove to be a key factor. Sue Dobson explains how this worked in practice.

'I have a great team of people with me at Canada Life, as does Northdoor – and our open working relationship enabled us to tackle problems in a really innovative way. One example of this was how we decided to use Brio Software to help manage the vital reconciliation process.

'Northdoor had implemented Brio at Canada Life for business intelligence purposes some years earlier. We were already familiar with the benefits of using this software when analyzing and interrogating large amounts of data across multiple, mixed-platform databases. This was exactly the problem we faced in ensuring the data mapping processes were 100% accurate. Using Brio we were able to implement a simple dashboard interface that helped us ensure accuracy and resolve problems, quickly and efficiently.'

And with Northdoor's senior management involved in all aspects of the project, Canada Life were left in no doubt of Northdoor's commitment.

'Having Northdoor's senior management at all meetings helped build trust, and enabled us to resolve issues in a timely fashion.'

*'Given that this was an acquisition, there were a range of potential staff issues that had to be handled very delicately Northdoor excelled here, showing real sensitivity and understanding.'*

*'With Northdoor's help, this project was outstanding – on budget and ahead of schedule. Who could ask for more?'*





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But the technicalities weren't the only issues that Canada Life had to deal with. As with most large projects, there can often be a variety of political issues that can have a real impact on project delivery, as Sue Dobson explains.

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### *Successful conclusion*

Like many large-scale migration projects, the old adage that no news is good news still holds true.

'After seven months of planning and testing the migration itself proceeded as planned. It took over 40 hours to complete, and went better than we could have hoped for. The system was back up and running for user testing as per the schedule, with no problems to report.'

Tom Corcoran, Managing Director at Canada Life's Group Insurance Division, sums up the success of the project.

'I've lived through many big IT projects - they have always been harrowing experiences. Best case, the projects have taken years. Worst case, the project ends up cancelled after millions of pounds have been wasted. Migration of blocks of group insurance business just don't happen in less than 2 to 3 years - a terrible experience for both customers and employees. With Northdoor's help, this project was outstanding - on budget and ahead of schedule. Who could ask for more?'

*To know more and do more, contact northdoor*

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