

Speed to Market – Rapid Application Deployment



ACORD INSURANCE
LOMA SYSTEMS
FORUM

Concurrent Session

May 22, 2007



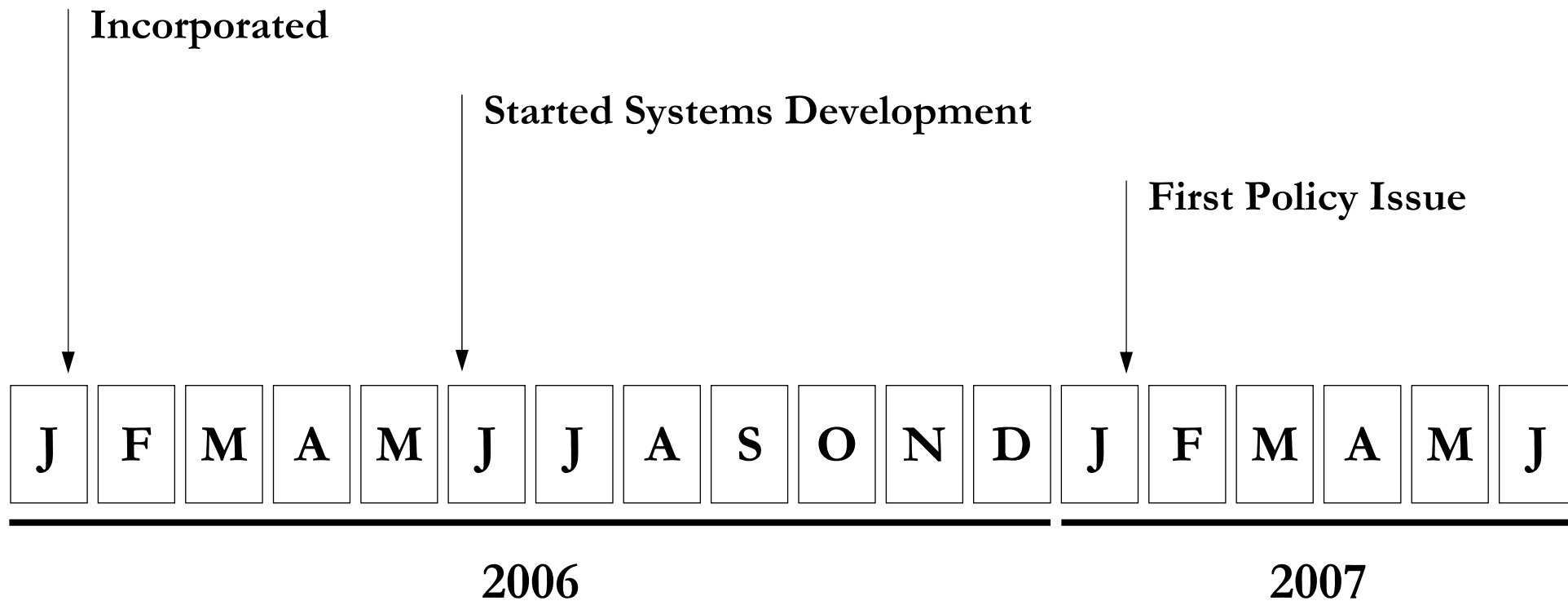
Introduction

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Privilege Underwriters, Inc.



- **Admitted Personal Lines**
- **High Net Worth Market**
- **Owned by Policyholders**
- **Extremely Selective**

Company Timeline



Systems Deployments

Core Systems

- Policy Administration
- Claims
- Financials/General Ledger
- Integrated Billing

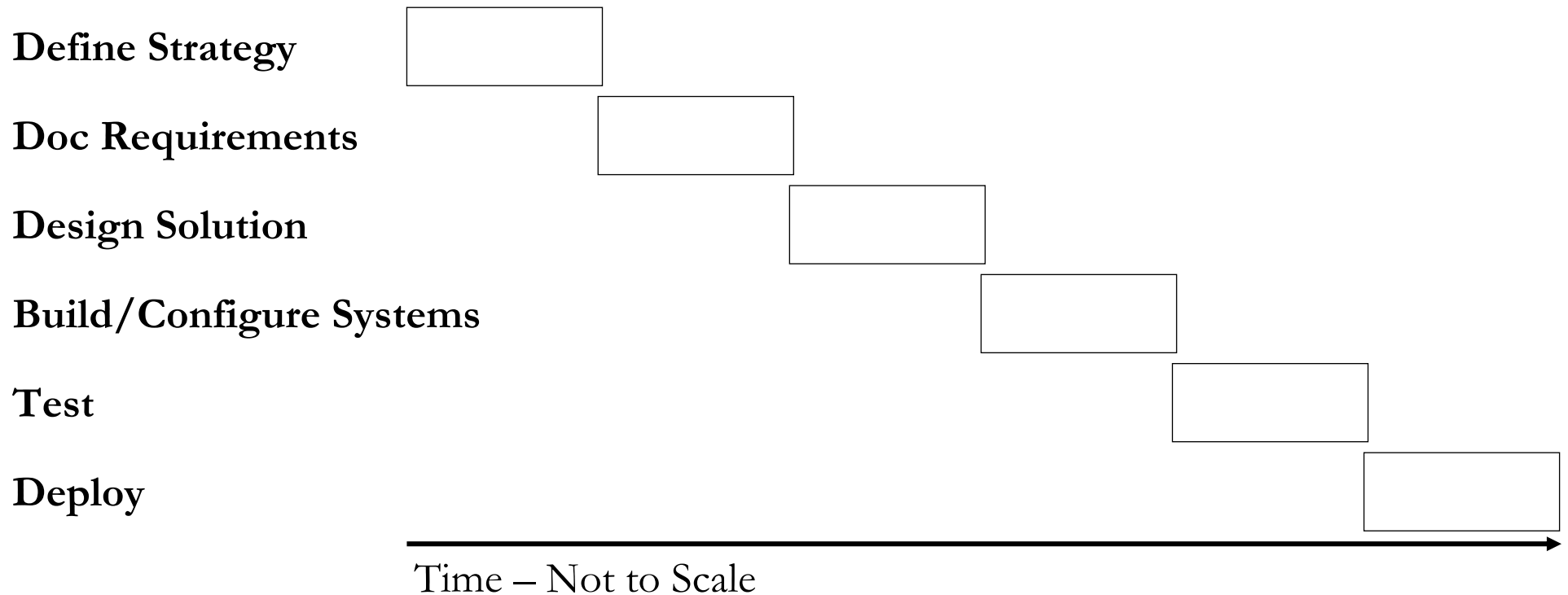
Support Systems

- Basic IT Infrastructure
- Website
- Reporting/Analysis
- Collaboration

Rapid Application Deployment

Project Approach

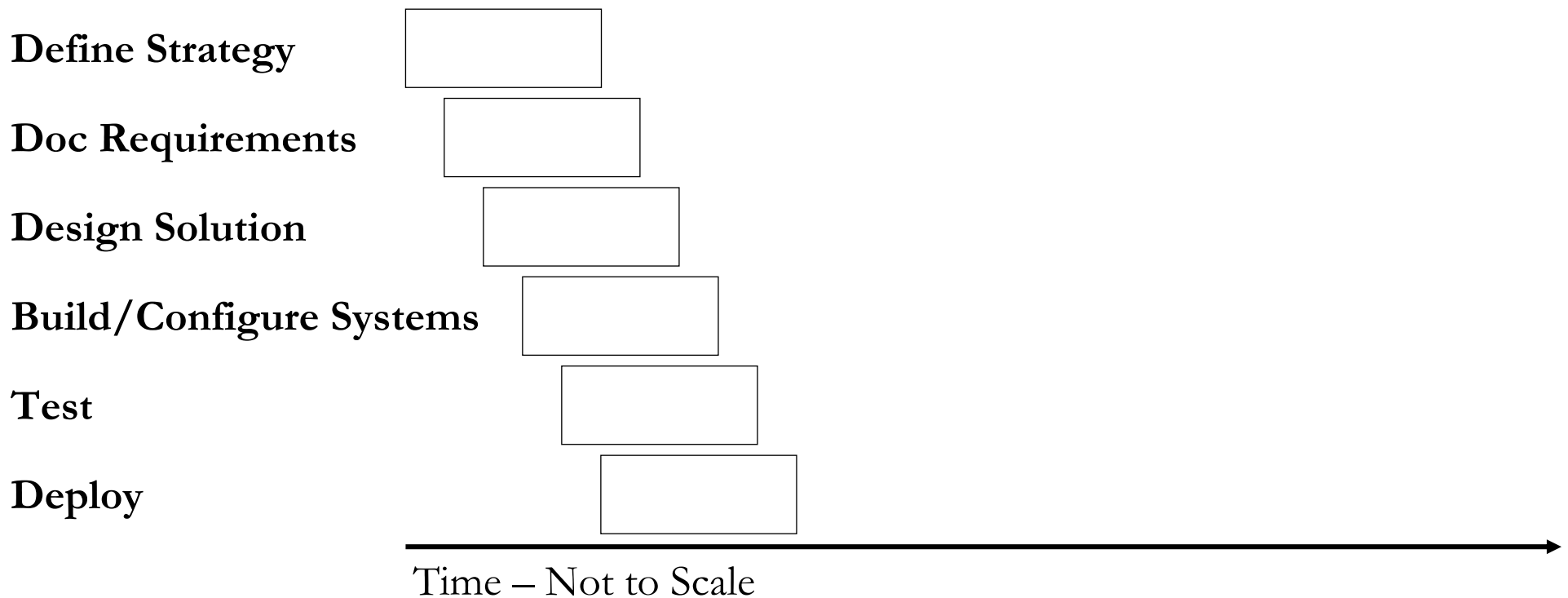
Traditional Project Approach



Rapid Application Deployment

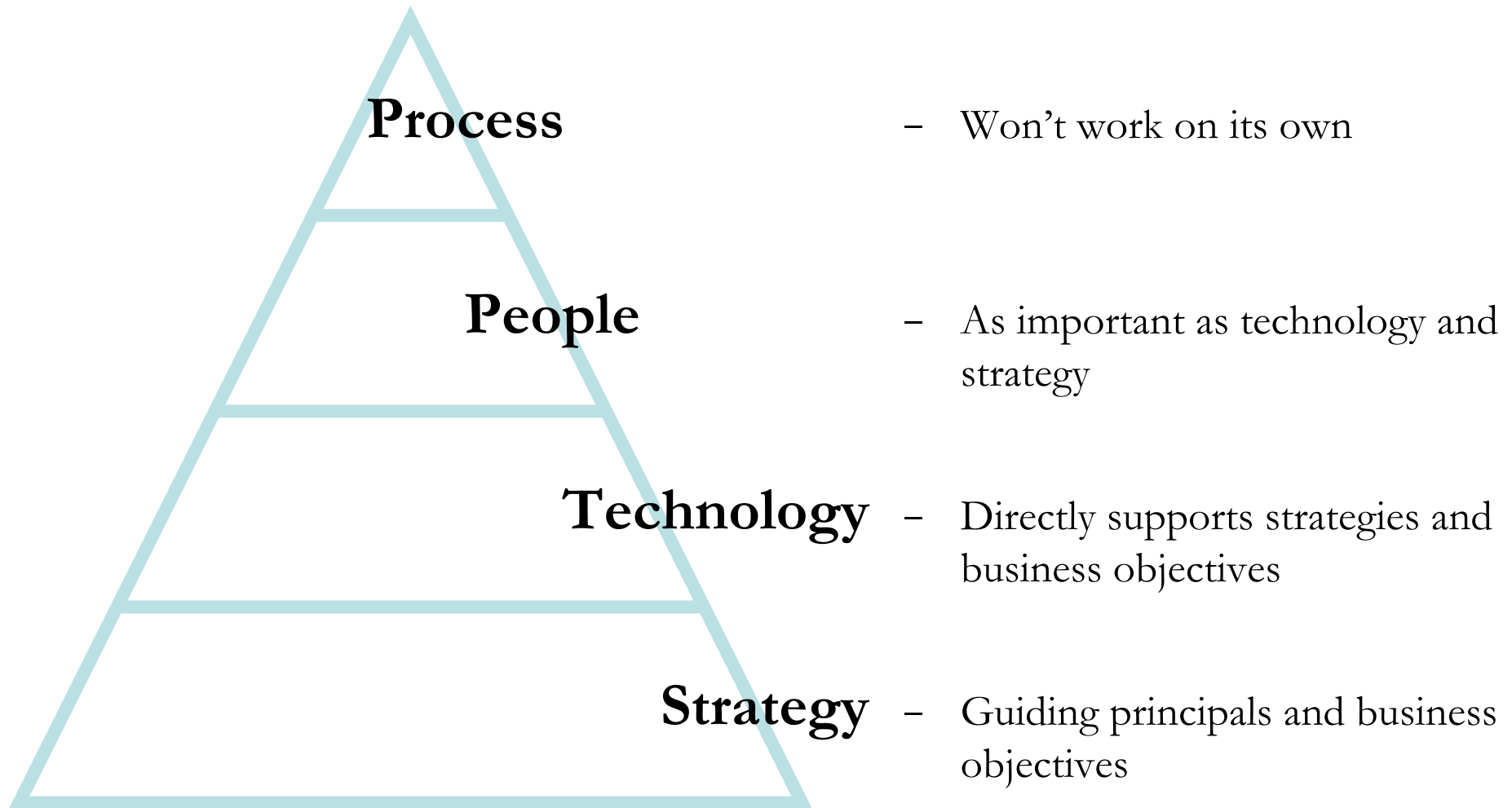
Project Approach

Reality of Today's World Approach



Rapid Application Deployment

Project Approach



Strategy

Guiding Principals

- **Be Business Driven**
 - Must serve a clear business need
- **Remain Open**
 - Support ability to adopt new business direction, technologies and ideas over time
- **Keep it Simple**
 - Straight-forward is better
- **Contain Long-term Cost**
 - Long-term efficiency/value-add generally trumps short-term costs
- **Focus on Core Skill Sets**
 - Focus on skills/expertise that directly relate to the core business
- **Begin With The End in Mind**
 - Know what “it” is
- **Seek Creative Solutions**
 - Multiple ways to achieve a goal

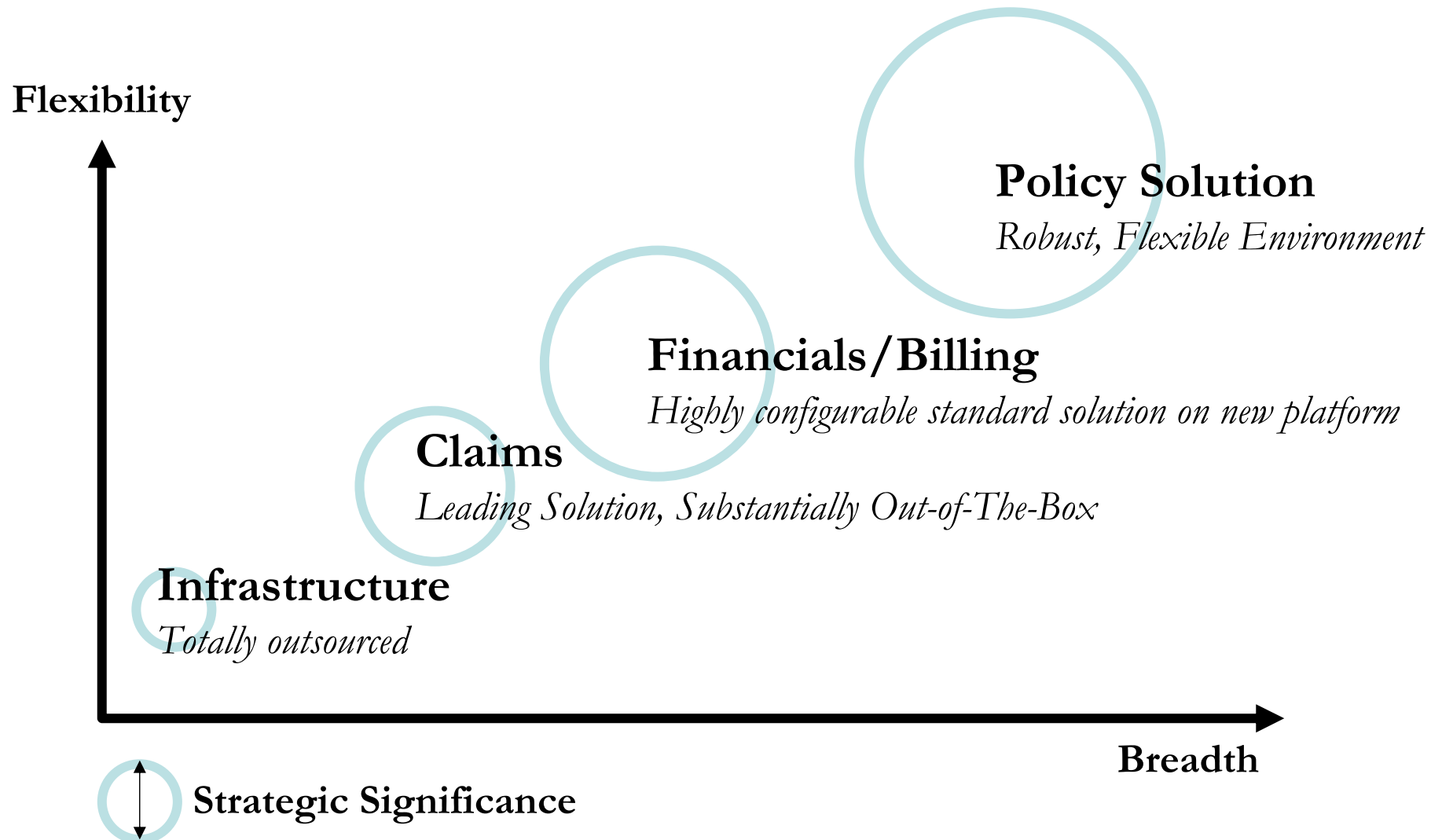
Strategy

Key Business Objectives

- **Speed to Market**
 - Begin to generate revenue
 - Multi-line, multi-state quickly
- **Flexible**
 - Unique product designs
 - Rules-driven/Rapid deployment
- **Data Rich**
 - Comprehensive
 - Ease of access
- **Integrated**
 - Intra-system communication
 - External data and services
- **Modern/Scalable**
 - Simple, intuitive, fast
 - Paperless
- **Reasonable Cost**
 - Minimize required capital outlay
 - Low operating/maintenance expense

Rapid Application Deployment

Technology



Rapid Application Deployment

Technology

- **Technology to Fit Business Need**
- **Flexible best of breed components**
- **Common Platform/Architectures**
- **Used “Out-of-the-Box” Where Possible**
- **Integrated 3rd party data, add-ons and web-services to extend capabilities**
- **Simple Solutions to Complex Problems**

Flexibility

Policy Solution

Robust, Flexible Environment

Financials/Billing

Highly configurable standard solution on new platform

Claims

Leading Solution, Substantially Out-of-The-Box

Infrastructure

Total

Breadth

Strategic Significance

Technology

Dragon Fit With Key Business Objectives

- **Speed to Market**
 - Metadata-driven, tools-based configuration
 - End-to-end-solution fully developed (*or quickly created*)
- **Flexible**
 - Easily configurable UI, rate, rule and forms
 - Actors, permissions and workflow quickly configured
- **Data Rich**
 - Central repository for rates, rules, forms, client/partner profile data and billing/payment instructions
 - Granular data that is easily accessible
- **Integrated**
 - Multiple integration options including webservice, XML
 - Document management
- **Modern/Scalable**
 - AJAX/DHTML enhanced interface
 - Oracle/Linux/browser based platform
- **Reasonable Cost**
 - Configuration via toolset without touching code

People

Internal Resources

- Business Knowledge
 - Immediately productive
- Project Direction/Prioritization
 - Keep things moving/focused
- Application of ideas
 - Unique application
- Develop ownership skills
- Long-term skill sets

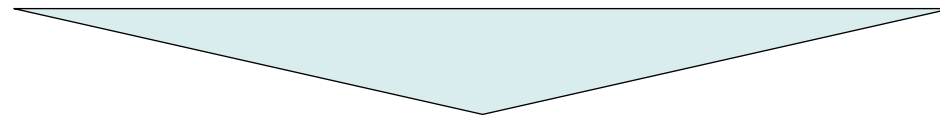
External Resources

- Technical Knowledge
 - Business understanding
- Project Execution
 - Timely deliverables
- Generation of ideas
 - Broad base of experience
- Facilitate transition
- Roll-on, roll-off

Rapid Application Deployment

People

- Hire team of the right people and focus them on high value efforts
- Select vendor partners that can meet needs in technical competency, commitment to execution, business insight, commitment to execution and flexibility



- Formed small team of dedicated business analysts working closely with product managers and vendor partner developers
- Made business users and leaders part of the design process
- Co-developed with OneShield for the entire project
- Leveraged OneShield's ASP services for Dev/QA/Production hosting

Process

Structural

- **Focused Energy** – Created product and common functions leads
- **High-Level Goals** – Created high-level deliverables and calendar
- **Clear Vision** – Defined ultimate objective; scaled back as required
- **Concurrent Development** – Created parallel efforts to merge later in the project
- **Constant Progress** – Strived to maintain momentum
- **Accept Rework** – Accepted there will be design imperfections

Process

Tactical

- **Plan Short-term** – Planned and executed in real-time
- **Delegate** – Delegated most tactical decisions
- **Reprioritize Constantly** – Reprioritized weekly, internally and externally
- **Frequent Releases** – Released as often as weekly
- **Communicate** – Encouraged multiple points of contact
- **Timely Decisions** – Eliminated bottlenecks quickly

Lessons Learned

Do things now that are difficult to do later

Control pursuit of perfection

Recognize quickly when something isn't working

No substitute for physical presence

Beware of unintended consequences