

Assignment Report

Customer Relationship Management in Insurance

A Swiss insurance company decided to replace their customer relationship management system (CRM) with a new one. A standard CRM already existing on the market was bought and customized to tailor the needs of the insurance. With a fixed go live date set, the new CRM system had to fulfill most requirements that the old system already did and additionally cater for a larger circle of stakeholders. Furthermore, a data migration took place with millions of records of customer data.

Project Goal

The goal of the project was to deliver the new CRM in-time, in-scope and in-quality. The “big bang” approach resulted in decommissioning of the old and the implementation of the new CRM on the same weekend. A challenge was the amount of dependencies on a technical and organizational level: interfaces, data loads and dependencies in the IT landscape as well as stakeholders and teams from various org units.

Our Contribution

Spark Mind acted in a delivery manager role. The support included the coordination of development efforts between all involved teams, the prioritization and formulation of the product backlog and the facilitation and communication with various business and IT stakeholders. Furthermore, the operations of the running CRM, facilitation of releases, project governance and reporting were critical for the successful completion.

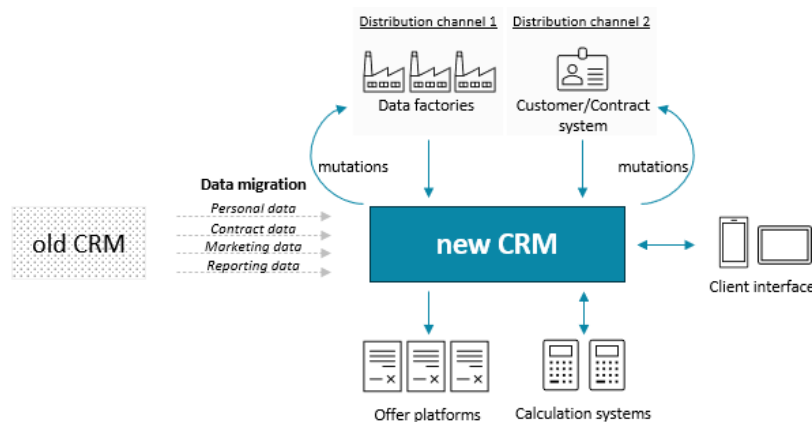


Figure: Complexity was driven by the number of interfaces and system involved.

Conclusion: all data from the old CRM system had to be migrated as well as the existing interfaces were replaced, which required a great amount of coordination and dependency effort.