**Digital and Web Platform Project**

**3030 Insurance Inc.  
Toronto, ON**

**February 28 2020**

1. **Executive Summary**

This business case outlines the business concerns, benefits along with the recommendations and justification of the Digital and Web Platform Project. Company goals and future vision are also discussed here.

* 1. **Issue**

Due to advancements in the competition, as well as desires to expand operations and the client base, 3030 Insurance is in need of an overhauled system for ease of access for both clients and employees.

Expanding outside of Ontario would require immediate access to the resources of the company in order to establish services for new clients as soon as possible. Performance and data of different areas must be made available to the HQ in Toronto, in order to analyze further growth.

Employees and managerial staff are currently using the legacy system to view relevant employment information. In its current implementation, such an action is slow and cumbersome in today’s world.

Options for clients such as instant quotes and profile viewing are currently impossible without first needing to contact 3030 Insurance by phone. While phone access must remain an option, the expectations from a growing net-savvy userbase must be met.

* 1. **Anticipated Outcomes**

Moving to a web and digital based application with a centralized server will allow for quicker expansion at a reduced cost.

Staff will be able to view their pay stubs and perform operations from any device. Support can be made available quickly to staff and clients.

Client acquisition can be of a greater scale, and at greater ease.

* 1. **Recommendation**

Implementation of the new system will allow the greater flexibility and ease of expansion across the company. The data and processes will be moved and implemented in phases, in order to allow seamless integration into the new system. The new system should maintain familiarity with the majority of the staff at 3030 Insurance.

Client access using the new system should feel very modern and intuitive, in order to welcome more users into the system.

This new system will allow for quicker expansion, as having a streamlined system across multiple locations will remove the need to re-train employees upon arriving at a new location.

* 1. **Justification**

Migrating operations and data to a central server is integral to the expansion plan. As the company grows, accessibility and speed are paramount to the success of 3030 Insurance. This implementation allows for both of these factors, whilst reducing the cost for customer acquisition. By being able to provide some services over the web, the acquisition process can be sped up whilst reducing cost.

1. **Business Case Analysis Team**

The following individuals make up the case analysis team.

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| --- | --- | --- |
| **Role** | **Description** | **Name** |
| Executive Sponsor | Provide executive for the project | Daniel Lee, VP Operation |
| Technology Support | Provides all technology support for the project | Alec Pagliarussi, VP IT |
| Process Improvement | Advises team on process improvement techniques | Suho Kang, Process Team Lead |
| Project Manager | Manages the business case and project team | Barrington Venables, Project Manager |
| Software Support | Provides all software support for the project | Ed Entecott, Software Group Lead |

1. **Problem Definition**
   1. **Problem Statement**

3030 Insurance has always operated in Ontario, Canada. Without a plan to expand or grow their operations, the current infrastructure does not support any kind of major growth or modernization. The data stores are currently stored on site, and access to this data can only happen on site. The data is also stored through varying forms of media requiring, in some cases, physical copies of media whenever information would need to be shared.

Information relevant to employees would also need to be found from Human Resources, or on a physical form of media posted somewhere in the offices.

Access for clients and potential clients are mostly through a phone line or in person at one of the branch locations. Phoneline saturation are a major bottleneck when dealing with many clients at a time, with potential losses of business when clients are unable to reach our centre. Weather is also a loss of business when it comes to the retail locations.

* 1. **Organizational Impact**

The DWP Project will have a slightly bumpy, but overall positive impact on 3030 Insurance. The DWP will completely replace the existing legacy system. The system will be rolled out in phases, so that existing employees will have enough time to be trained and become acclimated to the new system.

Autonomous functionality will remove much of the manual input required from current employees in day to day functionality. Communication between employees will be greatly improved and streamlined.

Improved functionality on the customer end will free up a great deal of time for employees, as well as create greater opportunities for customers to gain services from 3030 Insurance.

* 1. **Technology Migration**

In order to minimize downtime and disruption, a phased approach will be taken as follows (high level):

1. Hardware and necessary software will be purchased and implemented. Databases and tables will be set up and tested by the development group.
2. Functionality rollout will begin with human resources functionality: payroll, scheduling, hours. A copy of current HR information will be copied over to the new databases.
3. Operational data (client and staff) will be copied over to the new system. Extensive query testing and data retrieval testing will be performed over this phase.
4. Inputting and updating data will be implemented and tested, adding along any new information that was obtained in phase 3.
5. Employees will be trained on the new platform, in the same order that the phases were implemented.
6. The new platform will go live alongside the legacy system in case of emergencies. After being deemed to do so by the development group, the legacy system will be brought down and archived.
7. **Project Overview**

The DWP Project overview provides high level details for 3030 Insurance’s problems. Implementation, results and performance metrics will be discussed here.

* 1. **Project Description**

The DWP Project will review all the daily processes of 3030 Insurance. From there, custom solutions will be developed in order to meet the current business needs as well as the business needs of the future. Each solution will be reviewed by executives of 3030 Insurance to ensure the business requirements are met. After approval, the project will be implemented and completed once the legacy system is archived.

The project seeks to improve day to day efficiency of all operations within 3030 Insurance as well create opportunities for expansion to different areas. Costs will be lowered, and autonomy will open up greater opportunities for growth amongst the current employee base.

* 1. **Goals and Objectives**

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| **Business Goal** | **Description** |
| Business Expansion | Web based storage and operation will allow access to the system from anywhere, increasing ease while reducing cost of expansion |
| Staff Efficiency | More automation in tasks will allow staff to be more efficient, and focus on more complex details instead |
| Reduce costs | Digital and web-based storage will reduce 3030’s overall operating and maintenance costs |
| Reduce customer acquisition cost | Having a web-based application that customers can interact with will reduce the amount of time and cost needed to add clients |

* 1. **Project Performance**

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| **Key Resources** | **Performance Measure** |
| Client data | Reduce query speed and reduce cost in storage |
| Maintenance | Reduction in staff requirements as maintenance no longer needs to be done on site, and can be done in longer intervals |
| Staff | Fewer HR and payroll positions will be needed. Fewer customer service representatives will be needed due to automation. |
| Communication | Communication between employees will be quicker and easier, allow for quick adaptation to changing scenarios in the workplace |

* 1. **Project Assumptions**

The following assumptions to the DWP Project. This list will be updated as planning continues.

* Staff will be trained accordingly in their respective duties to utilize the new system.
* Funds will be available for training.
* Funds are available for hardware purchasing or any other requirements.
* Support will be offered by both executives and senior staff.
* Operations are expected to continue during implementation.
* New IT infrastructure must be implemented.
  1. **Project Constraints**

The following constraints apply to the DWP project. This list will be updated as planning continues.

* There are limited IT resources already present within 3030 Insurance.
* Off the shelf products are limited in their flexibility for what is required of the business.
* The custom solution would imply a limited amount of support from other vendors.
* Data storage regulations differ from province to province and must be accounted for.
  1. **Major Project Milestones**

The following are the major project milestones identified at this time. This list will be updated as the project moves forward and target dates are modified.

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| **Milestone** | **Target Date** |
| Project Charter | 2020/02/28 |
| Project Plan Review | 2020/03/02 |
| Project Kickoff | 2020/03/11 |
| Phase 1 Completion | 2020/04/20 |
| Phase 2 Completion | 2020/06/09 |
| Phase 3 Completion | 2020/07/31 |
| Phase 4 Completion | 2020/09/06 |
| Phase 5 Completion | 2020/11/10 |
| Phase 6 Completion | 2020/12/10 |
| Closeout/Project Completion | 2020/12/21 |

1. **Vision Statement**

*” For 3030 Insurance who is looking to expand operations and its customer base, The Digital and Web Platform Project is a modern solution that delivers autonomous solutions and simplifies operations to meet these goals. Unlike the current solution which does not accommodate expansion and is restricted in its ability, our product will provide a modern, adaptive, and fast solution to ensure growth and success in the company. “*

1. **Agile Team Charter**

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| **Project Name: Online Insurance Quotation** | | |
| **Vision**: Help increase insurance agent productivity by creating a system to acquire potential client data before final assessment of given insurance. | | |
| **Mission**: Help our insurance system calculate insurance quotes online with rough customer data, in order to provide customers with estimates before speaking with an agent. | | |
| **Success Criteria**: 1) Implement database by March 20th, 2020 2) Increase Agent productivity by allowing customers to acquire rough quotations through our online system. 3) Increase productivity for the signing of new customers within 3 months | | |
| **Project Team** | | |
| Name | Role | Phone |
| E. Entecott | Software Support | (416) 895-8869 |
| S. H. Kang | Process Improvement | (416) 865-6696 |
| D. Lee | Executive Sponsor | (416) 287-5437 |
| A. Pagliarussi | Technology Support | (416) 272-9455 |
| B. Venables | Project Manager | (416) 447-7837 |
| **Rules of Behavior**: 1) All team members will treat each other with respect at all times.  2) Project designs and implementation plans with be open for feedback and change for all team members.  3) Open communication among the team and leads will be accepted  4) All prior team member experiences and knowledge will be brought into the development process.  5) Take responsibility for any and all project missteps. Open communication with team members will allow for fixes to be developed quickly.  6) Listen to whomever is speaking during the daily scrum.  7) Help each other, and ask for help when needed. | | |
| **Communications**:  1) We will hold daily meetings in the break room at 8:30am each day.  2) We will aim to attend daily scrums to the best of our ability. (Notices of delay or transit issues will be accepted).  3) Updated tasks will be affixed to the central board and sent in an email each day.  4) Minutes will be sent out within 24 hours of each meeting. 5) If a meeting must be cancelled, members will send in updates to the product owner. Information missed will be given out at the start of the next meeting.  6) All team members are expected to be on time for all meetings. | | |