

Rapid growth by acquisition out-strips the IT infrastructure of an international insurance brokerage

A growth business is a great thing unless you fail to scale.

An international insurance brokerage was acquiring new companies faster than IT needs could be supported. Problems were growing as quickly as their acquisitions. Something had to change for the client to continue rapid expansion and maintain competitive service levels.

Our client had recently migrated its customer-facing IT solutions to the cloud, but even the best technology was falling short without the right people and processes to support it. Internal IT applications posed even more problems. They were too numerous and fragmented for anyone to manage, let alone organize into a strategic plan.

Our client needed help designing an end-to-end process that could support their ever-expanding technology and operational needs. They chose Clerestory to analyze the current operating model and guide their business leaders in creating a more efficient, scalable technology solution. We engaged our client's leadership and stakeholders to define and communicate a future state vision for the technology organization. The comprehensive vision included the essential behaviors, expectations, and cultural practices necessary to support lasting change.

After establishing the desired vision, Clerestory led a future state

process redesign initiative across crucial technology and operations functions. Knowing people support the change they create, we guided the cross-functional client team to design and validate each process and align on the systems, roles, and responsibilities needed to solve the operational issues they faced.

Of course, strategies and plans are useless unless carried out in real life. We developed an implementation roadmap to guide our client along each step needed to enact and support the new organization design and processes. In every project, we apply EMBED componentsSM, our proven change management methodology, so people owning redesigned workflows and tools have the knowledge, skills, and attitudes needed to champion new ways of working.

We didn't stop there. Clerestory helped the insurance brokerage client position itself for greater success with enhanced future state capabilities. We developed a post-merger integration staffing model based on future state processes and roles. This tool supports the client's aggressive acquisition strategy by planning for the necessary IT resources to integrate newly acquired businesses. We also addressed that unwieldy technology portfolio. We completed a comprehensive application assessment so that, over time, the technology organization could refine its IT strategy based on reliable data.

Working together with our client, we designed a scalable, process-driven operating model. This model supports ongoing expansion and makes the insurance brokerage even more competitive in the industry. Defining clear and consistent responsibilities and socializing new ways of working, the client gained the capacity, direction, and buy-in needed to achieve market-leading organizational change.

100+

applications analyzed during the project

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I have been with [this organization] for 13 years and we have had several great initiatives that have provided better service to our fields and clients. However, this is the first initiative that has been about investing in the people and improving the way we work.”

– Working Session Participant