Digital Transformation: Overcoming legacy system challenges: Halving operational processing time

as presented by

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Zicht Adviseurs

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Personal Risk Explorer

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Start	>
Conversation report	>
Client details	>
IN AND AROUND THE HOUSE	>
- Damage to house	>
- Damage to household contents	>
- Damage to valuables	>
MOTOR VEHICLES	>
- Damage to motor vehicles	>
FAMILIY AND RECREATION	>
- Damage as a result of liability	>
- Damage as a result of legal disputes	>
- Damage during travel	>
- … etc.	>

Uitleg

Hi Geertje, Filip, Wouter, Branka, Christelle and Joe,

Welcome tot the Personal Risk Explorer!

The Personal Risk Explorer is a conversation structure to provide advice on how to deal with the risks faced by the client, to create a conversation report, and to immediately issue action items to the appropriate person.

Risk survey
- First, you determine the agenda. Then, under the risk groups, you determine which specific risks you want to discuss.
- For each risk, if present, you can retrieve and display the policy.
- Indicate the status of the risk (icons).
- Depending on the type of product, notifications will be shown that relate to coverage.
- Based on this, in-depth questions are also asked.
- Based on current coverage and customer choices, 'important information' is shown. You can still edit this text.
- If desired, you can add a free explanation.
- For each risk you can create action points if you wish.

Tips:
- On the right side is a bar you can click on to preview the report.
- In the navigation menu you will also find the topic 'Save as document', this will save the report as pdf.

Good luck and have fun!

Achievement summary
What was delivered and what was the result?

As Lead Business Analyst I successfully guided a digital transformation at Zicht Adviseurs, modernizing their risk insurance tool. This resulted not only in a 50% reduction in operational processing time for 90% of the cases but also increased employee satisfaction and operational efficiency.

Achievement details
Please explain the details of the initiative and the approach that was taken.

Background:

Zicht Adviseurs, a subsidiary of Nationale Nederlanden with 450 employees, faced challenges with their dated Risk and Insurance tool. The tool, originating from 2009, came from a smaller IT vendor, bringing issues like limited development potential, expensive customizations, and an outdated interface.

The issues spanned from limited development capacity to high customization costs, and from outdated interfaces to hosting vulnerabilities.

This mismatched Zicht Adviseurs' strategy, compromising their technical strategy to work only with SaaS companies that are responsible for their own hosting. And it compromised their client-centric service quality.

Providing high-quality service towards the customers was under pressure

Sharp insights from business analysis were key in the initiative and approach in all three phases:

1. Proof of Concept (PoC)

2. Digital Change Project

3. Implementation

As the Lead Business Analyst, I was responsible for all the business analysis activities in all three phases.

We consulted multiple IT vendors and decided to continue with Finly based on their capabilities and alignment with our vision. Our first major step was an exhaustive PoC with Finly.

1. Business Analysis during Proof of Concept

- Conducted thorough requirements gathering by interviewing SMEs, studying previous documentation, and analyzing past incidents.
- Reviewed the functionality and conducted a gap analysis against the standard functionalities of Finly.
- Multiple methods for requirements documentation was used during the PoC phase:
  - MoSCoW ("must-have," "should-have," "could-have," and "won't-have (this time)."
  - User stories
  - This meticulous approach was applauded by Joost Heijligers, CEO of Finly.

"We have never received such a good requirements document. To avoid disappointments in an IT project afterwards, this is perfect." - Joost Heijligers, CEO of Finly

After the Proof of Concept was a success we continued towards the next phase, the digital change project.

2. Business Analysis during digital Change Project

- Engaged key users from five regional offices in rigorous testing, shifting the organizational culture and improving successful system adoption.
- Addressed significant initial challenges and closely collaborated with the Product Owner (PO), IT vendor, Functional Administrator and Project Manager.
- During iterative agile way of working I facilitated testing and set up essential configuration documentation for insurance policies, knowledge rules checklists and PDF-output:
  - Insurance policies: for insurance policies, I mapped and documented the integration with the core policy system. Where necessary, data from the source application was cleansed.
  - Knowledge rules checklists: Developed knowledge validation checklists based on user input and domain expertise. The front end, powered by Finly, performed real-time validations using an API integration with the secure client data system ANVA.
  - PDF-output: standard text and PDF-layout was build based on Marketing and Communication input. As Lead Business Analysts I facilitated this process.

- Adopted a phased rollout strategy by offices. Each office we visited with the project team by giving a demo and to be available for questions during on the job training.
- Fostered a culture of embracing errors and rapidly resolving them, bridging the gap between IT and business.
  - The people working with the new software had bad experience of previous IT projects
  - By embracing errors and fixing them quick we turned this mindset around. The feedback loops between business and IT where as short as possible. I took point here in facilitating this.
  - In addition to project scope we implemented wishes from the business in an iterative way.
  - Championed a continuous improvement mindset throughout the process.

Challenged faced and lessons learned

During the PoC, digital change project and implementation we learned many lessons. Here a few:

- Proof of Concept (PoC):
  - During the PoC phase, we encountered scope creep, which extended the timeline. We had to recalibrate and swiftly conclude the PoC to transition into the digital change project phase.
  - Lesson: Always keep the PoC's objectives in sharp focus, emphasizing its role in assessing the IT vendor's suitability.
- Digital change project:
  - The iterative nature of the agile approach can sometimes blur the endpoint, leading to continuous testing and tweaks. While we initially set an implementation date, the system wasn't fully ready by then. We postponed by three weeks, ensuring a smoother rollout on the subsequent date.
  - Lesson: In agile projects, it's crucial to set tangible milestones and maintain the discipline to adhere to them as closely as possible.
- Implementation:
  - For each rollout, we presented a demo to the users, showcasing potential future enhancements alongside current functionalities.

However, this approach sometimes muddled the users' understanding, as it was their first exposure to the system.
- ○ Lesson: Communication must be clear and tailored to stakeholders' immediate needs. It's essential to prioritize their current context over potential future changes.

Key achievement
Why do you think this initiative should receive the award?

"The failure of IT vendors to deliver on promises I have experienced several times in system implementations. In addition, they often only looked at the cost, but not at what it would deliver for the business. During the digital change process for a new risk insurance tool, we approached it carefully with an extensive Proof of Concept and by involving users extensively. Mellius was responsible for the business analysis during the PoC, change project and implementation. I would definitely recommend working with Mellius! He has a helicopter view, is good at setting priorities and connects the business and IT. The system successfully went live and resulted in more user convenience, a 50% reduction in operational processing time for the bulk of the cases and less frustration in the department. As far as I am concerned, the methodology of this change project is the blueprint for all future digital change projects we will implement within our company." - Gladys Geurts Product Owner – Zicht Adviseurs

The project's success was not only in implementing a more efficient system but also in the approach taken. By emphasizing collaboration, diligent preparation, and user involvement, we ensured a smooth transition and tangible benefits. The endorsement from Gladys Geurts, Product Owner at Zicht Adviseurs, attests to the significance of this initiative and how it can serve as a blueprint for future digital transformations. Last but not least: this project was done successfully because of the team effort. I worked happily together with: Peter van Berchum (IT consultant Finly), Johan van Miltenburg (Project Manager Zicht), Gladys Geurts (PO Zicht) and Arjan Mulders (Functional Administrator Zicht).