

End-User Computing to Enterprise Calculation Services with Mo.net

Customer: Banking & Insurance Organisation

Website: -

Customer Size: 1,500 employees

Head Office: UK

Industry: Life Insurance

Software and Services

- Mo.net Model Development Studio
- Mo.net Quotations Service
- Excel Model Adapter

During a multi-year programme of work to migrate closed books of business from several legacy policy administration platforms onto a single strategic platform, our client recognised that a significant number of end-user computing tools were used to support a range of associated business processes – for both internal and external customers. Rather than attempting to update each of the EUC solutions to work with the new administration platform, the client decided to consolidate and migrate many of those solutions to a core set of centrally supported enterprise calculations powered by Mo.net.

Business Challenge

In common with many other insurers over the last 20 years, our client had a strategic objective to consolidate policy administration activities for a range of products from five legacy platforms onto a single strategic platform. The key drivers for this migration were:

- Cost-savings (technology and people)
- Process efficiency and improved customer experience
- Rationalisation of platforms, technologies & support activities
- Centralisation of knowledge, skills & support

The client's expectation was that a single, modern PAS platform would provide the necessary functionality to support the required range of product types and associated business administration activities for both closed & open books of business.

By and large those expectations were sound, however their legacy PAS platforms had been adapted & extended over the years to cope with features beyond their original scope. Furthermore, various supplementary tools had been developed, mostly by end-users, to address shortcomings & changes in requirements that couldn't be retrofitted into the core administration platform. Since most of these tools were only used by specific individuals on a relatively sporadic basis, the number of tools in use and the extent to which the business relied upon them wasn't immediately obvious during the analysis phase of the programme. As a result, there was a programme hiatus while the business determined the most appropriate way of resolving the challenges posed by the end-user computing estate.

Solution

Since Mo.net was already being used by the client to perform non-standard back-office calculations in relation to claims, surrenders, transfers, and statement generation activities, various models were in place for each of the core product types – annuities, protection, etc. It was therefore a logical step to consider how it might be possible to extend the core calculations already performed by Mo.net to include functionality that was historically provided by the EUC solutions.

Approach

The client used a 5-step approach for understanding how best to resolve the challenge posed by the legacy EUC estate. These steps were as follows:

Step 1 – Discovery

One of the many challenges associated with end-user computing is the lack of a single, coherent list of solutions. The first step in the process of migrating functions away from the legacy EUC estate was for the client to generate this inventory. The client employed manual and automatic methods for doing this, but after a few weeks of activity was satisfied that a complete list had been captured. The result was a list of nearly 100 EUC solutions, which were almost exclusively spreadsheets.

Step 2 – Review

With a list of EUC solutions in place, the next stage was to review the solutions, in terms of the business process supported and the functionality offered by each EUC. This exercise also included a review of any documentation available for the EUC and talking to current users / developers of the solution.

Step 3 – Categorisation

Having gained an understanding of each EUC, the next step was to decide whether the EUC functionality was still required. The client quickly discovered that within the 100 in-scope EUC solutions, many were duplicates of the same underlying solution, but with specific features for different applications or product variations. Consolidating these versions resulted in only 15 EUC solutions being left in-scope for migration. The client was then able to use Excel Model Adapter (Analyse Edition) to confirm that the remaining workbooks were suitable for migration to Mo.net.

Step 4 – Migration

The remaining in scope EUC solutions were migrated across to three Mo.net projects, each of which reused some calculation logic from the core calculation projects developed for the non-standard PAS calculations. The approach for migration was a combination of heavy lifting by tools including the Excel Model Adapter (Migrate Edition) and manual porting & refactoring of more complex calculation logic.

Step 5 – Deployment

With the new Mo.net models in place and having been tested, the calculations were deployed to a separate instance of the Mo.net Quotations Service used for hosting the migrated EUC solutions. A range of client applications, including PowerBI and Excel were then used to request calculations from the service on demand. The calculations were then supported by the same staff responsible for supporting the core PAS calculation models.

Key Benefits

The client realised some tangible business benefits as part of the migration journey. These included, but were not limited to:

- Process re-engineering, standardisation and simplification – resource optimisation
- Retire legacy EUC tooling and standardise / consolidate technology stack
- Address key man / knowledge risks and gain better understanding of calculations
- Documentation & other controls around systems and processes
- Use of industry-standard interfaces to minimise manual handoffs and improve integration between systems & processes

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