

Multinational Insurance Company Uses Hybrid Agile Salesforce® Delivery Team To Deliver Releases Rapidly

The client engaged with a high-cost development partner for their Salesforce project and did not have the knowledge to stand up an internal team to put the system into production, take control of development, and migrate vendors without missing committed release deadlines.

Company:

Leading multinational insurance company

Industry:

Insurance

Line of Business:

Retirement

Location:

Global

Challenge:

The project needed to move into production and the necessary in-house skills were lacking

Services:

NEOS Services for Salesforce Agile Transformation

Results:

Enabled the client's Retirement Division to develop a platform that served seven personas across multiple departments, while sharing data and a single customer view, forecasting, and enabling a parallel sales effectiveness program

BUSINESS PROBLEM

The client retained a high-cost Salesforce development partner for their Salesforce project. The requirements gathering and development were running fine; however, the client realized they lacked core Salesforce program management, had no established way to move to production, couldn't take control of the project from the vendor, couldn't deliver to release deadlines set by business needs, or provide training and production support.

ACTION TAKEN

NEOS partnered with the client to assess the project, make recommendations, and provide a roadmap. The recommendations were accepted and NEOS built out the project team. NEOS delivered:

- Rapid project assessment, made recommendations on staff, process, tools, data, training, and support
- Defined roles, responsibilities, and hired internal and external personnel to build out the team, getting them operational as a high performing team rapidly
- Project management to manage the 50+ staff working on the project, run project financials, and deliver project reporting to the client's PMO
- End-to-end application delivery management running fifteen workstreams, three vendors, four teams while implementing a new hybrid agile execution methodology and hitting release dates and budgets
- Real-time on-demand integration from backend systems into Salesforce
- Salesforce business process led, persona-based training
- Production support leveraging the client's existing systems with a successful hand off to the client

THE OUTCOME

The client successfully integrated backend systems to pull data in real-time for display within Salesforce, meeting the requirements of scope, budget, and release dates. A new team was created to support internal production and now uses hybrid agile methodologies to link agile development, legacy move to production, and cloud production systems.



INSURANCE



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