# Platform Replacement

**fifth STEP**™

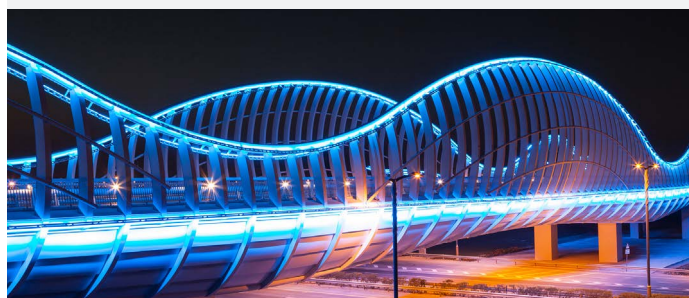### The Background
Sometimes, although a platform replacement project is already in-flight, an independent assessment is not only necessary, but imperative. In this case, our client, a major insurance company, was using two platforms – one for eligibility information and the other for claims. Fifth's Steps main objective was to bring these two functions together, and a full review was required to establish the project's status.

> "The key to success was understanding changing business needs and the requirement for software to enable this change."



### The Challenge
The key challenge was that the platform's software was not upgradeable against a background of changing legislation, while the client's requirements included the ability to provide a single view for both eligibility and claims. The key to success was understanding changing business needs and the requirement for software to enable this change. Some decisions had been made during the vendor selection process which impacted on the success of the project, and we also identified that management was light, and this resulted in lack of clarity.

### Our Recommendations
Revisiting and re-enlivening the communications plan was key to getting communications for the change project in the right position. Fifth Step recommended the production of an over-arching plan for three groups and a "single version of the truth" in respect to what was being delivered and how it would help the client. We also encouraged viewing different approaches that would make the initial configuration more consistent and efficient by encouraging earlier engagement from business users. We also suggested extending the number of people who had knowledge and experience of the new system.

> "The client recognised that the Fifth Step approach was integral to their aim of delivering a "single version of the truth.""
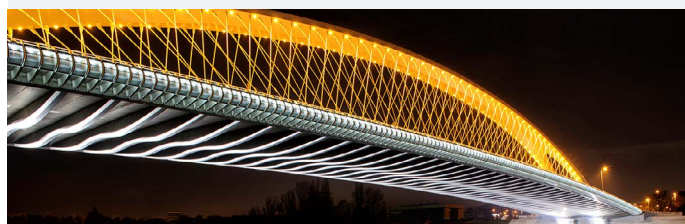


### Our Solution
There were a number of technical aspects to this project, all of which needed to be integrated to ensure successful delivery. We suggested that the services of a Technical Project manager should be considered. We also proposed a formalised approach to vendor management, consisting of regular meetings and shared documentation including a product enhancement backlog and defect list.

### The Outcome
We formalised the governance of the project, ensured all project management artefacts were created and implemented a system of regular maintenance. Our team was integral to the process of formalising the vendor and change management process, and saw that detailed documentation for business requirements and process flows were in place. We delivered improved communication between everyone involved in the project, and leveraged the support of the business for the configuration of the new system.

### The Benefits
As a result of Fifth Step's focused and engaged approach the client is now able to perform business orientated and technical reviews, and schedule regular reviews during phases of development. They can also finalise the technical architecture decisions process, produce technical documentation and implement accordingly.

### The Future
The client recognised that the Fifth Step approach was integral to their aim of delivering a "single version of the truth." In addition, we played a key role in ensuring their future by seeing that usability issues were addressed by engaging with business users for feedback while planning multiple performance tests of the system.

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