Agile Data Center Migration for a Global Life Insurance Provider

Business Situation
Headquartered in Canada, this client is one of the largest life insurance companies in the world, operating principally in Asia, Canada and the United States. It was one of the first foreign life insurance companies to establish operations in Japan – entering that market in 1901. Today, it provides a wide range of financial-protection and wealth-management products designed to meet the changing needs of customers over the course of their lifetime. The client's business relies heavily on the Policy Admin System (PAS) Ingenium application to handle policy administration tasks for its individual life line of business.

Challenge
The client was looking to simultaneously migrate from its existing data center operations and upgrade the technical stacks of the Ingenium application. Management subsequently decided to upgrade the software and hardware environment supporting the Ingenium system and maintain BAU (business administration unit) operations to make the company's IT assets more robust, scalable and agile. There were several reasons behind these objectives:

- The company was aggressively trying to increase its product line; simply adding insurance products to the existing Ingenium application would further degrade the system's performance.
- Middleware and database software versions were outdated – hampering alignment with newer technologies, and stalling the implementation of straight-through processing (STP) to accelerate processing time.
- Batch processing timelines were frequently hitting thresholds and negatively impacting the business.

Solution
We proposed the development of an innovative, agile data center migration model that would involve a core team of resources with expertise in insurance software products, as well as supporting middleware. During the analysis phase, we proposed setting up a Lab PC (software provided for PC systems) that would install all new versions of the middleware to validate the compatibility and configuration parameters. Following this process, the requirements for both file system space and targeted software were identified. The PAS application was installed on top of the middleware, and used to test the new software as a “trial and error” method for checking the stability of the client's insurance application. In the Lab PC approach, initial versions of software are installed; any issues that arose during this initial setup were immediately brought to the attention of corresponding product vendors, and corrective actions taken.

In the meantime, we worked with the client on hardware and software specifications for the
new data center. Procurement instructions were passed to the data center provider. Test servers were built on new hardware. Regression testing was performed, along with parallel testing, to validate and enhance existing and new applications. The client had lined up the launch of a new medical insurance product as part of its BAU operations – leading to additional verification requirements.

We prepared software and storage requirements for the production server, and provided support for building new production servers during the product testing phase. After the production servers were made fully functional, they underwent user acceptance testing (UAT).

Regression testing was performed on both the old and new servers, and end results compared and verified. Once the results were approved, the old server was shut down and the newly migrated server was made operational.

One month of complete SIT, E2E, UAT and Production Simulation Testing was performed before the actual cutover to the new insurance product on the PAS application in old and new servers. Data center migration and Ingenium products were tested in parallel.

A total of 15 new servers were installed within six months, without affecting any of the company’s business process servers. These included Test,
UAT, Model Office and Production servers that were used for the company’s daily core insurance business.

**Benefits**

The data center migration allowed the client and its business users to:

- Continue the transformation journey, and look at more straight-through processing (STP) to cut processing time.
- Utilize a proven approach for upgrading a complete software and hardware environment, which reduced the time of the overall batch cycle.
- Carry forward BAU operations with minimal impact. During these kinds of migrations, most companies would typically freeze all of their systems and projects for six months to a year. In agile migration, new insurance products are launched quickly — even during data center migration.
- Realize monetary benefits from the "on/off" cost model.
- Overcome the time difference between the countries; seamless offshore reinforcement opens an additional support window.
- Identify typical upgrade issues ahead of time and easily implement new features — a dual benefit of the client’s strategy.