Case Study

Reimagining Case Management Platform for a Leading Insurance Brokerage Firm

LTI enabled design thinking-led re-platformization of a 25-year-old legacy system

Business Challenges

The firm was grappling with a Legacy Case-Management platform (25 years old) unable to meet evolving client needs. It failed to provide a delightful experience to its internal business users. Some critical case & policy related information was also getting rendered incorrectly on an agent facing portal, reducing its adoption & it was a poor experience for the agent.

What we did?

Empathy conversations were conducted with all representative business users of the platform & the portal, which was 70% of the firm's employee base.

Before creating insights & problem Statements, observations were bucketed & affinities were drawn. Prioritizing these statements for the 3-day co-design workshop, birthed 300+ ideas and became a spring-board for early prototyping.

200+ of those ideas found place in the exhaustive epic feature backlog which became the bible for real development of the platform & portal.

Agile methodology with a sprint-based development approach was chosen for implementation.
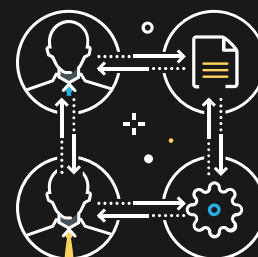
What was achieved?

300+ ideas
were generated

This 7-week design thinking intervention led to **detailed feature listing and backlog creation** for the platform and the portal.

MS Dynamics was chosen as the platform of choice that will house the **revamped Case Management & Policy Placement workflow.**