

How Helvetia Successfully Consolidated Two IT Landscapes in the Nationale Suisse Merger





Industry: Insurance

Headquarters: St. Gallen, Switzerland

Revenues: €7 bn

Results

- Single source of truth for strategic IT management decisions
- Identified Million Euro Synergies due to reduced IT redundancy
- Faster start for IT projects, reduced setup effort
- Shared EA responsibility with central governance
- Established technology standard catalogue

The Challenge

Helvetia has a long tradition. In over 150 years, it has grown from a number of Swiss and foreign insurance brands into a successful insurance group that does business in six European countries. Today, around 7,000 employees serve more than 4.7 million customers. At the beginning of 2014, Helvetia joined forces with the former Nationale Suisse insurance company. Besides new growth they wanted to realize economies of scale amounting to over €100 million per year.

After the merger, IT had to balance multiple priorities: First, they needed to ensure business continued its operations as usual. Second, they had to combine the IT departments of the former Nationale Suisse and the “New Helvetia.” Finally, they needed to provide IT support for the integration of all business processes, such as transferring thousands of insurance policies and claims dossiers while keeping the overall target architecture in mind.

The Solution

A best-in-class IT management ecosystem

To execute a successful IT merger, an overarching transparency is essential. The IT management needed answers to questions such as: Which application is used in which functional domain? Where is the highest potential for synergies? How does this change the risk profile? To meet this challenge, Helvetia relies on an ecosystem of best in class IT management tools. LeanIX is the backbone of Helvetia’s strategic application intelligence management. In combination with other IT management tools, it provides a 360-degree view on technology data in a business context.



The agile, lightweight and fast to implement approach of LeanIX fits the needs of the IT organization with distributed responsibilities while following a central governance. It allows my team to establish an increased IT transparency across country borders. We get insight faster and better than before. The information contained in LeanIX enables projects to start faster and decreases ramp-up costs.

Silvio Hefti, Group CIO Helvetia

A sound basis for decisions

The Confluence Wiki integration allows IT to link documentation directly to applications, as well as to publish LeanIX reports to Confluence projects. As a next step, IT also planned to show development tickets and architecture decisions from Jira as LeanIX heatmaps. In the context of the IT merger, LeanIX bestpractice reports served as a basis for many decisions. The matrix visualization of the complex relationships between applications, user groups and business capability domains helped to make the right decision on the target landscape of the new Helvetia. For technical planning, the LeanIX visualizer provided necessary information on existing data flows, interfaces and technology.

Enterprise Architecture services for the group

Balancing the requirements of IT integration in a merger requires a solid communication basis between technology leaders and business management. The Enterprise Architecture (EA) team around Group CIO, Silvio Hefti, therefore follows an Enterprise Architecture approach with central governance, but shared responsibilities. The EA team provides up-to-date knowledge about the IT landscape to the group. Whenever they can provide value for a team, they share their knowledge and experience in short workshops that have already delivered initial results. After these workshops, the EA team provides further support and involves the teams in short data sprints to improve the knowledge on the Helvetia IT landscape on an ongoing basis.

Working towards group standards

As a next step to further harmonize and rationalize the IT landscape at Helvetia and make support easier, the EA team has initiated an initiative to move to groupwide technology standards. The team expects savings by reducing redundancy in applications and technology, as well as better support levels for a more manageable technology landscape. LeanIX supports this use case in a flexible way. Powerful tag groups help to quickly mark technologies as standard. Based on that, an assessment on standard-conformity can be conducted and the roadmap can be planned on how to move towards standard technology solutions.

The Success

In the first half of 2015, Helvetia was able to reduce redundancies and realize substantial savings. In their half-year report they reported IT as a major contributor to these savings. Establishment of transparency was a crucial first step towards doing so. Today, the established LeanIX inventory serves as the single source of truth that strategic IT management decisions are based on.

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