

Vendor Transition and Adopting Best Practices

Case Study

CLIENT...

MSA Research, the leading provider of financial information relating to Canadian insurers and reinsurers on both the property and casualty (P&C) and life/health arenas, provides comprehensive financial information and analytics applications to professionals in the insurance industry.

The evolution of MSA Research applications, the requirements of a very demanding industry, and the business growth over the years required a better approach to manage the application development process.

CHALLENGE...

MSA's technology footprint is based on several components and systems. These include commercial websites, internal operational systems, on-premise and in-Cloud infrastructure, as well as a complex array of third-party integrations. This system infrastructure demanded a world-class management approach, with a strategic vision to help MSA Research evolve and adapt to its increased traffic and information volume.

MSA reached out to Proximateam for support in finding a development partner with broad expertise, who could meet their technology needs. Given the growth of the company and the complex nature of their business, MSA Research needed an optimal approach to oversee their technology infrastructure and to manage the application development processes.

APPROACH...

Our team executed a three-step approach for the vendor transition effort:

1. **Discovery:** This initial stage took three weeks. We focused on:

- Sharing information as to the types of technology employed, and the software and hardware architecture in use or to be used.
- Discussing existing business processes, tools, involved stakeholders, and responsibilities.
- Discussing current pain points and future business needs.
- Exploring technical aspects and Q&As.
- Developing plans for vendor transition, functional, non-functional, and integration requirements, and a project plan which included team recommendations.
- Developing a statement of work to encompass all of the above and have first review prior to concluding the session.

2. **Transition Kick-Off:** This second stage, in which we executed the transition effort and operational knowledge transfer, took 6 weeks.

3. **Team Ramp-Up:** Based on the results of the previous phases, the team ramped up to the required resources.



RESULTS...

Besides the peace of mind that Proximateam provides by supporting its operations, MSA Research experienced the following benefits during and after the transition effort:

- Access to a global pool of experts to support a variety of tasks, including Cloud architecture, application security and system integration with a sheer array of third-party systems (MS Dynamics, Payment Gateways, and others).
- Implementation of new system features to support the automation of business processes that were previously done manually.
- Ongoing support for operational systems without compromising development capacity of new features.
- Cost savings in training and initial learning curve.

- Improvements and adoption of best practices toward reducing the creation time of registration for events by 40%.
- Confidence in entering or planning new improvements, whose objective is to reduce costs through optimization of resources.
- Security in the continuity of operations through the implementation of automatic processes for information backup and disaster recovery.
- Improved security and performance for application users through the implementation of new and best practices.

TECHNOLOGIES...

- Microsoft .NET (ASP.NET, MVC, C#)
- SQL Server/RDS
- AWS
- Microsoft Dynamics



We were very impressed by Proximateam's careful and client-centric approach right from the get-go and have been extremely pleased to be working with them. The team members that we interact with have completed several projects for us already and have proven to be professional, efficient, reliable and creative. They have been a delight to work with.

The fact that many of the team members are based in Costa-Rica has not posed any issues for us. The time zone works and all the staff members we deal with speak excellent English.

The solution has provided us with cost-effective, professional service and most importantly peace of mind.

- Joel Baker
MSA CEO



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