**Rick's Dilemma**

**Internal and External Pressures**
- Multitude of IT systems.
- Changing Jurisdictional Legislation.

**Core Competencies**
- Identifying and Adhering to best practices.
- Providing customer service that exceed expectations.

**Alpha - Legacy System**
- CaselSM.com

**Alpha - Legacy System**
- Developed to address interdependencies and speculations.
- Effective and comprehensive.
- Initially built as a stand-alone system.

**User Struggles**
- Increasingly involved in updating work changing governance regulations.

**Other Struggles**
- Required maintenance changes and repeatedly requiring additional day work.

**Decision Time**
- ISS - What certainty does ISS provide Canadian Shield.
- AIS - Additional time and formal needs assessment would need to be conducted to prove the ROI ability of the AIS.

**Cross Roads**
- ISS - What certainty does ISS provide Canadian Shield.
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**Seamus Reynolds**
- CaselSM.com

**BIG PICTURE**
- Limited functionality?
- Learning to time frame of implementation and overall cost?
- Will it meet our needs?
- Is year development possible?
**rick's dilemma**

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**Big Picture:**
- Limited Functionality?
- Longevity to time frame of implementation and overall cost?
- Will meet our needs?
- 5-year development phase?
Seamus Reynolds

CaseISM.com

- Works for Information Systems Department for the Canadian Shield Insurance Company operating as a division of Assurance Centrale Inc.

- Services provided in western and central Canada – Vancouver, Alberta (Edmonton and Calgary), and Halifax, Nova Scotia

- Assurance achieved higher growth rates over the years by acquiring small regional insurance companies
  - Acquired Canadian Shield 10 years ago
Internal and External Pressures

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Alpha - Legacy System

CaseISM.com

Creation/Configuration:
- Developed in-house more than 15 yrs. ago by IT team for $50,000
  - Initially fishing and hunting lodge clientele and then expanded to auto, property, and commercial insurance
  - Struggle to adapt new needs
- Once considered "leading-edge" technology but failed to undertake updates
- No comprehensive documentation of the source code existed -- relied on expertise of one programmer
Alpha - Legacy System

• Developed as a client-server configuration using a text-based interface driven by menus accessed through function keys
• Programmed in COBOL and was described as a “labyrinth of patches”
• All insurance policies were stored and maintained in the ALPHA system database software with several onsite servers
Insurance Software

**Solution**

**PROS:**
- Ability to house all necessary information for Canadian Insurance Company.
- Ability to change the information as government regulations change

**CONS:**
- Too complicated and sophisticated for the users to operate, also difficult to train new users.
- Needs another year and a half, and more financing to stream-line for use.
- Lengthy process to make changes to the system.
- Not capable of billing, conducting quotes, and claim ability.

CaseISM.com
Abandon ISS ----> “Black Hole”

Adopt AIS----> Coincides with core competencies

Research --->
Establish time frame: continued ALPHA system indefinitely, implement AIS or comparable roll out within a year.
Investment: Determine financial implication of purchasing and integrating new AIS system.
Scope and Quality: already established.

Result:
• Short term investment into research and implementation.
• Proven ROI with an off the shelf product
• Finite budget implications v.s. uncertain budgeting concerns with ISS
• Solution to well defined problem
Advance Insurance System

PROS:
- Ability to house all necessary information for Canadian Insurance Company while also seamlessly changing with government regulations.
- Fast and easy functionality for users as well as easier on boarding and system training for new staff.
- Capable of billing, conducting quotes, and claim management
- Proven track records as AIS is already successfully being used in the industry
- The system has multiple purchasing options