

## The P&C Insurers'

# 5 Step Guide to a Successful Migration to the Cloud



There are critical steps to ensuring a successful cloud migration, and Insurity has your guide to do just that. From kickoff to implementation and beyond, we recommend that insurers consider the following best practices at each stage of the cloud migration process:

- Be forward-looking with regard to application management
- Remember that operational changes are as significant as technical changes
- Engage key stakeholders early and ensure that engagement continues throughout the process

With 250 cloud clients with users in over 100 countries, Insurity has developed a standardized cloud migration methodology and a multi-phased approach to help create a smooth migration experience for our clients.

### 5 Critical Cloud Migration Steps:

#### 1. Develop a Well-Documented Migration Strategy

The success of a cloud implementation begins and ends with the migration strategy and detailed migration planning documentation. Insurers must identify the stakeholders and assemble the project team to run the migration. This team will be responsible for setting the migration phase timelines, defining deliverables,

completing an inventory of the in-scope interfaces and applications, defining the post-migration support and operational processes, and accounting for existing business milestones that could impact the overall migration. Insurers must also work with partners to balance migration planning efforts while minimizing overall business disruption.

## 2. Define Requirements

Validating existing on-premise architecture documentation while developing a contextual interface diagram to outline how each interface currently functions is critical when planning for operational change and developing seamless cloud workflows. Reviewing the changes to application and infrastructure management that will result from a migration to the cloud will help set realistic expectations and will ease the transition to a new model of application management, which will be based on a partnership with the SaaS provider.

## 3. Pre-Migration Planning and Activities

In this phase, insurers must focus on the critical steps and activities to complete before moving on-premise environments to the cloud, while also establishing a plan for post-migration support. For example, a vital aspect of the pre-migration planning phase is implementing the required connectivity to enable the remaining on-premise systems access to the new cloud environment.

## 4. Cloud Migration and Regression Testing

The cloud migration requires careful orchestration and must follow a detailed migration plan. This plan must include a detailed summary of each migration step required to completely cut over the on-premise system to the cloud environment. Differentiating between critical and non-critical path activities is an essential step to building an optimal cloud migration plan. An integral component of all cloud migrations is planning and executing a thorough regression test, ensuring that the key system functions and external connections are operational, after each environment is migrated. The testing should focus on the system edges to ensure that each application, its related interfaces, and authentication mechanisms function in the same manner in the cloud environment as they did on-premise.

## 5. Cloud Support Model

Once the migration is complete, carefully managing the post-go live support model will ensure that the migrated systems and associated operational processes are functioning as expected. In this phase, insurers should review that internal and external team roles and responsibilities are clear and aligned, and make any necessary adjustments to optimize business and system workflows. This activity will serve to validate the company's strategy and approach to support the cloud-based application over its lifetime.

By migrating to the cloud, insurers gain new capabilities that extend across their environment, software, content, reporting, and resources. A successful cloud migration needs a foundation based on setting goals to successfully lead insurers down the path of digital innovation. To learn more about Insurity's cloud leadership and enterprise-grade SaaS platform, [click here](#).



[www.insurity.com](http://www.insurity.com)

866.476.2606

© Copyright 2020 Insurity, Inc.

All rights reserved. Not to be reproduced in any form or by any means without prior written permission from Insurity. The names or identifiers of certain third party products and services referred to above may be the trademarks of their respective owners.