

CLIENT SUCCESS STORY

PHC

Project

Design and deployment of a Salesforce Transformation



Client
PHC



Industry

Financial Services - Insurance

Location

Manchester

Staff

50

Products

Sales Cloud

A wholly-owned subsidiary of AXA PPP (Part of the global AXA Group) PHC provides a wide range of specialised insurance products to employers through a panel of intermediary firms. Acquired by the AXA group in 2015 and now considered an incubator for innovation, the 50 strong team prides itself on agility and service.

The Business Challenge

PHC have evolved over 10 years using in house skills to deliver technology support. Post the acquisition by AXA PPP the need for an architectural review was identified to ensure the organisation could meet the demands of a rapidly changing marketplace and regulatory landscape.

PHC concluded that an organisation-wide transformation programme was required to remove the technical debt, migrate from legacy unsupported platforms to a new technology platform that could scale rapidly and drive innovation.

In addition, as a regulated entity, PHC needed to establish a platform that could respond to changes in requirements and practices with minimal redesign and support the organisation as it entered its most challenging.

“Consleague has not only delivered a functional and highly efficient Salesforce system. They have quite literally transformed our business from the ground up.”

- John Doe, Director of Sales

The Solution

Process and Data Modelling utilised to design an application architecture that reflects actual business practices and needs.

Information Security considered from the outset and built into the design from day 1.

Creation of a suite of financial services applications to support the following business functions.

Sales - Salesforce capabilities utilised to deliver complex hierarchical model that supports the intermediated financial services marketplace.

The Results

As a result of the Transformation project, PHC have been able to:

- Retire 6 Legacy Applications that were used to support the core of the business
- Move from a knowledge-based organisation to a process led organisation
- Meet regulatory requirements from the regulator (FCA) and the Data Protection Commissioner with minimal overhead
- Streamlined reporting and management information under a singular team
- Gained self-sufficiency in the creation and management of system driven documentation
- Achieved greatly reduced time to market for new products
- Increased the control and automation within the Finance team
- Increased consistency in the handling of complaints and claims
- Reduced architectural risk and debt through the transition to a recognised target operating model

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