



Business Transformation Program Design & Launch

National Insurance Brokerage

Type of Business

Financial services client focused primarily on distributing property & casualty and employee health & welfare insurance products and services to small and mid-sized business clients.

Statistics

Annual Revenue:
\$500 Million

Retail Offices: 90 offices in 18 states

Contact Information
Available on request

Business Challenge

Client identified a goal / vision to transform their enterprise by establishing a shared services capability for back office accounting and information technology in order to reduce the high business support costs and lack of standard processes in a distributed environment. The Program launch required clear objectives, governance structures, executive support, and business alignment.

Action and Results

Client management engaged Avalion to establish the organizational structure of the Program including a Steering Committee and Program Management Office (PMO). Avalion also drove the design of the Program definition, charter, scope, and communications.

Avalion established a Steering Committee with deep business / functional representation and an executive sponsor. Avalion also coordinated a 2 day Program “kick-off” meeting with executives representing each of the business units. Additionally, a formal Program charter was delivered that documented Program objectives, expected benefits, and a high-level operational strategy. The effective Program launch will enable successful execution as well as effective and lasting change.