



Shared Services Planning & Governance

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 establish 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. Client was challenged with transforming the vision into execution and operations.

Action and Results

Client management engaged Avalion to advise on the development of the tactical plan of scheduling, staffing, and executing the program. In this ongoing effort Avalion is evaluating and prioritizing potential projects for the current year and defining governance requirements including – establishing a steering committee, defining service level agreements, creating services catalogs, and defining the cost allocation methodology.

Through better visibility into requirements, project dependencies, and staffing requirements, Avalion helped establish the proper governance and oversight. As a result of the governance structures put into place, the Program was re-planned with the highest value-creating initiatives prioritized ahead of the lesser priority efforts. Services levels agreements are being developed based on the service catalogs to ensure effective execution of the Program.