Duck Creek Technologies

WHITE PAPER

Duck Creek Virtual Delivery of Core Systems Implementations

Introduction

As the world experiences a shift in operating rules and standards in order to contend with the current personal and professional climate, the companies who will succeed are those that understand - and thrive in - a remote work environment. Historically, it was our stance (as was the case with most corporations) that we relied heavily on personal interaction and face-to-face meetings. However, over the past several years, Duck Creek Technologies has embraced the idea of remote work engagements and modified our approach to core systems delivery. This approach has enabled us to excel at delivering fast and smooth core system implementations with quality. Today, Duck Creek engages holistically with our insurance carrier customers and systems integrator (SI) partners from our global offices to implement our full suite of applications, spanning Duck Creek Policy, Billing, Claims, and more.

By aggressively leveraging modern software and tools designed for effective communication and collaboration, Duck Creek continuously meets and exceeds customer expectations for delivering implementations on time and on budget, even as they themselves work toward adapting to today's increasingly virtual world. Through preparation and understanding of the importance of communication aided by technology, Duck Creek positions itself as a delivery partner fully invested in the success of our customers. This preparation has made our Professional Services team resilient to the impacts of the COVID-19 pandemic, in which we have demonstrated sustained business continuity.

SaaS Operations and Infrastructure

Duck Creek's embrace of the latest technology is not happenstance. As a leading SaaS provider of insurance core systems, we have leveraged cloud computing and other advanced technologies to create the right infrastructure, processes, and procedures that allow our customers to operate efficiently and effectively in a remote work environment. By removing the restrictions of operating in an on-premises setting and replacing them with all necessary computing resources and services, Duck Creek allows our customers to focus on their own core competencies to provide the best service possible to their own customers. This ability to provide high-value customer service in turn allows carriers to grow and maintain an energized and satisfied customer base who feel secure in the knowledge that their insurance needs are being handled expertly and efficiently.

Virtual Delivery Overview

Not only does Duck Creek provide purpose-built, low-code-driven P&C insurance software that speeds software development and lessens the need to write code, infrastructure management, upgrades, and systems support, we also provide the means to realize rapid implementation of that software.

The Duck Creek Platform is versatile, extensible, and highly configurable to meet our customers' specific needs. Often this configuration of our software applications is performed by our Professional Services team. The methods and processes employed by this group translate well to a remote work environment, and have been for many years. Through different phases of engagement, Duck Creek Professional Services has employed communication and collaboration software such as the Microsoft Office 360 suite, including Microsoft Teams and Azure DevOps, to deliver configurations of our platform that meet customers' specific needs.

In order to achieve these outcomes, interaction must occur at several phases and levels. Traditionally this interaction relied heavily on face-to-face meetings, passing documentation back and forth, and in-person build and QA activities in common areas often referred to as "War Rooms." This required different resources to engage in-person, often at a customer site, and had a material impact on budget and unnecessary travel effort. Through remote-work engagements, travel budgets are reduced, documents and information are communicated effectively, and group work is executed via cloud-based collaborative software. Requirements are gathered, demonstrations are performed, designs are authored, and build objects are delivered, all from remote locations with no negative impact on timelines. In fact, a credible argument suggests that delivery timelines are reduced due to instant access to documents and deliverable build objects being produced.

In the next parts of this white paper, we will lay out our approach to virtual core systems implementations through each phase of the development cycle—from analysis to go-live. While these phases are

described in a linear manner, it should be noted that this methodology is utilized in projects taking both an agile approach and a traditional waterfall approach. Whether the customer chooses to embrace agile and implement aspects of their core systems in smaller releases or opts to take a more traditional "big bang" approach, the phases described below are similar in nature.

Also, note that this white paper is based on our recommended remote delivery model, regardless of whether implementation projects are Duck-Creek-led or consist of a team of Duck Creek experts on a team that also includes one of our SI partners and an insurance carrier customer.

Analysis Phase

The *analysis phase* consists of requirements gathering, whereby the goal is discovery of what a carrier would like to build. In preparation to determine the best solution to satisfy the customer's needs, meetings are held via cloud-based communication software. An integral part of these requirements gathering sessions is to convey to customers both the standard, out-of-the-box software functionality, as well as describe what can be built by way of "art of the possible" configurations. During these sessions, demonstrations and presentations are performed via screenshare.

One of the biggest benefits of in-person meetings is the ability to read the room, assess body language, gauge responses, and anticipate interactions. In an ideal scenario, we've found that having kickoff and discovery meetings in-person provide some value, but they aren't essential to implementation project success. While it's difficult to replace the in-person dynamic entirely, we've found that greater reliance on video communication tools can provide at least some sense of nonverbal cues, while also enhancing team productivity. From these sessions, our Professional Services team and, if applicable, the SI, gain an understanding of the required adjustments from out-of-the-box software to satisfy customers' specific needs. Documents are created to convey this understanding and ensure that all parties are on the same page. Authoring software such as Microsoft Word, Excel, or PowerPoint – with collaboration features – allow updates from multiple parties at distant locations simultaneously. This ability to update in real time allows authors and consumers of these documents to understand the direction of the documents as they are being created. This shortens the timeline of delivery and allows for more efficient review as consumers, including architects and quality assurance staff, have had time to digest and analyze the information as it is being created.

Design Phase

While the *analysis phase* defines what is being built, the *design phase* defines *how* the software needs to be configured, and reflects the methods needed to meet a customer's criteria for success.

Once the implementation team understands the desired outcomes of configuration, architects design the manner in which these configurations will be accom-

plished. It is imperative that architects understand requirements documents clearly – and participate early and often in the *analysis phase* discovery sessions that define the requirements, and consume the output from these sessions in real time.

Architects are then responsible for creating the design documents that will guide development teams in producing the desired outcomes specified by the requirements. Lead developers may participate in the authoring of design documents with collaborative authoring tools. By removing the need to check out documents or transmit them via email, participants creating these documents can update and review content in real time, provide feedback immediately, and make modifications in response to this feedback quickly. Reviews of design deliverables are performed with conferencing software, including screen shares, allowing both business and technical teams to come to an understanding of the design approach for delivery of requirements. While in the past, engagements may have been dependent on the right architect resource(s) to fly in and join *design phase* sessions on-premises, the shift to remote work has given architects additional time back – enabling them to not only have more hours each week to get work done, but also give them additional flexibility for scheduling meetings.

Build Phase

The *build phase* refers to executing on the plan specified in design documents, whereby teams utilize configuration tools, write extensions, and integrate Duck Creek applications with third-party tools or proprietary user interfaces.

The goal of professional services engagements is to provide end products that satisfy our customers' needs. To do so, implementation developers consume requirements and designs, which in turn become actionable items. These build items are created as wholly functional objects that, when coupled, provide customers a future-ready system with which they are positioned to meet the ever-changing needs of their insureds, agents, and internal end users. This orchestration of individual pieces requires collaborative development. Historically, collaboration tended to happen in a physical space at set times with specific people. Today, collaboration is much more fluid, and collaboration tools provide accessibility and visibility, whereby a broader range of personnel can participate and bring new ideas and perspectives to the project if necessary. Utilizing cloud-based source control, developers hand unfinished configuration output and extensions of carrier insurance products, business rules, and policyholder and agent user interfaces back and forth and submit completed work items for review in real time. Edits and comments from senior staff may be performed live with developers so that understanding of methods and techniques is not hampered by distance or location. Collaborative software with screen share is used to enhance this process.

Quality Assurance (QA) Phase

The *QA phase* consists of comprehensive review and testing to ensure configurations made to Duck Creek software work as intended and match customer requirements. Once build activities are complete, QA must be performed. In the past, restricting participation to a combination of Duck Creek staff, SIs, third party QA firms, and customers who were on-site limited the number of available testers. Today, remote engagement has allowed project teams to pull in a broader group of QA staff to participate in the testing process as needed. With instant access to requirements and design documents, QA staff can orchestrate the direction of their tests and outcomes during the requirements gathering process, shortening the overall delivery timeline. Virtual sessions with developers and business analysts allow the communication of defect findings and understanding of mitigation strategies, techniques, and timelines. Functional demonstrations presented using communication software allow remote participants a clear view of completed and delivered objects and provide an opportunity to raise questions and provide further feedback if necessary.

Delivery Assurance

Duck Creek's *Delivery Assurance Program* is a service provided by Duck Creek architects and product subject matter experts that ensures projects adhere to delivery best practices as defined by Duck Creek. The purpose of the program is to ensure implementation projects result in successful outcomes that maximize speed-to-market and mitigate delivery cost and schedule overruns, scalability and performance issues, and design rework. Delivery Assurance does not refer to a specific project phase, but rather takes place throughout the project from *Analysis to Go-Live*. It consists of two types of reviews:

A full *Product Conformance Review* includes a comprehensive assessment and results in recommended remediations of the following areas of a customer's solution: configuration, extensions, data models, DevOps, infrastructure, and industrialization. Interviews and review workshops are performed virtually via meeting software in a group setting with screen share, and automated code and configuration scanning tools are also executed. The workshops may include demonstrations by the customer (or their representatives) of the processes, documented deliverables, and functional objects that have been created, depending on the given state of implementation at the time of review.

Automated Delivery Assurance (ADA) reviews are a subset of a full *Product Conformance Review*. Tools are leveraged to run code scans, which analyze configurations and extensions to evaluate their alignment to documented best practices.

Duck Creek recommends that any implementation include three full *Product Conformance Reviews* and one *ADA* review, sequenced to align with project inception and major program increments. Both of these reviews include an analysis and

summary of the criticality of issues found, as well as recommended resolutions to violations of best practices. Between the fact that ADAs can always be run remotely, and that Duck Creek has run many projects where the majority of Product Conformance Reviews took place remotely, the Duck Creek Delivery Assurance program is well positioned to execute on fully virtual delivery projects.

Go-Live

Once all final QA testing, user acceptance, regression testing, and delivery assurance reviews are complete, customer deployments are pushed live in their production environment and replicated in their backup disaster recovery environment. Since new customer implementations are hosted in Microsoft Azure data centers (whereby the production environment and disaster recovery environment are located in geographically diverse locations), there is no need for any staff on delivery project teams to be on-site.

At Go-Live, the Duck Creek SaaS team takes on the day-to-day management of running of customer core systems. The customer can now focus on continuing to configure their own products, customer experiences, and business processes without having to worry about managing the underlying cloud infrastructure, upgrades, maintenance, or systems support.

Conclusion

By developing an industry-leading, highly configurable SaaS solution, leveraging communication and collaboration tools, conducting ongoing *Product Conformance Reviews*, and employing robust project management processes, Duck Creek has proven that fast, high-quality delivery of core systems implementations can be achieved in the "new normal" landscape of increased remote work environments. For Duck Creek, having conducted a number of delivery projects where a high volume of remote work was involved, these recent shifts have not impacted our ability to deliver, and indeed only prepared us better for today and the future.

In a time when the pace of change in insurance is accelerating, we recognize that carriers need speed and agility to act on opportunities as they arise, and we are proud to be leaders in helping insurers do just that. We look forward to continuously evolving our delivery practices and collaboration with our SI partners to give carriers the speed-to-market and consistent outcomes they need to win.

About Duck Creek Technologies

Duck Creek Technologies is a leading provider of core system solutions to the P&C and General insurance industry. By accessing Duck Creek OnDemand, the company's enterprise Software-as-a-Service solution, insurance carriers are able to navigate uncertainty and capture market opportunities faster than their competitors. Duck Creek's functionally rich solutions are available on a stand-alone basis or as a full suite, and all are available via Duck Creek OnDemand. For more information, visit www.duckcreek.com.