



Aquila Heywood

# Successful Migration and Integration at **Irish Life**

Case Study

Successful completion of a major integration project triggered by the acquisition of **Irish Life** by **Great West Lifeco of Canada**

# Successful Migration and Integration

## Key Figures



**7,000 +**  
schemes administered by  
Irish Life



**300,000**  
members covered



**9**  
months to complete

# Successful Migration and Integration

## Background

In July 2013, Great West Lifeco of Canada completed the acquisition of **Irish Life**, the largest Life and Pensions provider in Ireland.

The transaction was a major vote of confidence in the resurgent Irish economy and was one of the largest overseas investments ever in the Irish financial services sector.

Great West also owned **Canada Life (Ireland)** which had a smaller footprint in the Irish market.

# Successful Migration and Integration

## **Company Overview**

With Irish Life being the larger party and a more established brand, the decision was made to move all Canada Life (Ireland) business onto Irish Life technology and processes.

This meant migration and integration of Canada Life's pension schemes to Irish Life's corporate business platform powered by Aquila Heywood's Administrator™ solution and ensuring the continuity of Canada Life financial products.

# Successful Migration and Integration

## Business Objectives

Irish Life's business objectives were to:

1

Provide a seamless migration of data without impacting business processes.

2

Give customers a wider range of product propositions.

3

Enable self-service portal access for Canada Life customers.

# Successful Migration and Integration

## Key Challenges

The first challenge was to move all Canada Life's corporate business onto the Irish Life Administrator platform. The combined business covered over 300,000 members. Clean and accurate data was essential to the overall success of the project.

Pre-planning identified the areas of most complexity and highest risk. One key area was the Setanta Pension Unitised With Profits Fund offered by Canada Life, which was to be continued into the new merged system.

**The joint efforts of Aquila Heywood and Irish Life combined with the powerful tools within Administrator would be vital to the success of the project.**

Aquila Heywood consultants helped Irish Life set out an action plan for the programme, taking advantage of the self-sufficiency tools within Administrator that enabled Irish Life's project team to take control of the integration.

### Key Statistic

The combined business covered over

**300,000**

members

# Successful Migration and Integration

## Regression Testing

Provides a secure and repeatable mechanism to move manageable chunks of business data securely between the Canada Life and Irish Life environments.

Identifies instances where changes made to an area of Administrator impact on other areas of the system.

Ensures the data transfer process is accurate, efficient and with the emphasis on 'right first time'.

Allows regular checkpoints with Aquila Heywood consultant experts.

# Successful Migration and Integration

## Our Solution

The integration project took nine months to complete, with no serious issues encountered. To ensure all data was clean and accurate, Irish Life used the Aquila Heywood RegressionTester tool for the first time.

Irish Life's business IT team was able to complete repeated data migrations, without requiring extensive technical support from Aquila Heywood.

The tool was an essential component of the data integration project and gave Irish Life confidence that all successful integrated tests within a specific testing environment would be successfully replicated in live production when the final live migration took place.

The migration of the with-profits records was a particularly challenging task, but this was accomplished successfully through the same processes as applied to the whole migration. In parallel, Aquila Heywood's team ensured the Canada Life with-profits calculations and processing were fully tested and available within the version of Administrator that was in production use in Irish Life.

### Key Statistic

**9** months  
to complete the  
integration project



# Successful Migration and Integration

## Additional Propositions

This project was not solely about technical data migration, but also involved enhancing the product proposition for Canada Life's members. Irish Life had led market innovation in a number of areas, using Administrator's functionality to support its new propositions.

Canada Life customers were now able to access a wider range of fund choices.

Thanks to Irish Life's innovative approach, Setanta Managers' funds were set up on its system using Administrator's Enhanced Fund Manager functionality.

Moreover, Irish Life's latest innovation, a Corporate Savings plan, provided scheme members with alternative savings running alongside their pension account. This was added by Irish Life to Administrator without any additional software development by Aquila Heywood, demonstrating the benefits of Aquila Heywood's software investment in enabling customer innovation.

Irish Life's strong technology platform enabled it to excel in its own innovation, for example, Smartphone apps and investment centre development, as well as maintaining service for the 7,000+ schemes it administers.

“ Aquila Heywood's solutions keep us firmly in control of our own innovations in the market. Not only did they smooth the way for a successful consolidation of Canada Life's business, but they help us achieve speed to market for our new propositions as well. ”

**Paul O'Neill**

*Director, Irish Life Corporate Business*

# Successful Migration and Integration

## Additional Improvements

### Improved self-service portal

The award-winning Irish Life pension administration platform, Pension Planet Interactive, was made available to the Canada Life schemes. The Administrator-powered portal offers employers, consultants and scheme members more advanced facilities.

In this programme it was a key objective that transaction history be brought across from the Canada Life system to ensure all customers would have full online servicing.

Administrator's toolset helped Irish Life to ensure that all customer data was clean and accurate before being moved and readily available, in line with integration project milestones.

### No standing still

This complicated integration and portal migration not only delivered on its minimum requirements of meeting time, cost and quality targets, but it also delivered improved services and features to the members. A combination of effective tools, strong partnerships and a desire to innovate has seen Irish Life promote new propositions alongside the migration work.

### Key Statistic

The largest provider  
in Ireland, Irish  
Life covered over

**7,000**  
schemes

For more information, contact us on [enquiries@aquilaheywood.co.uk](mailto:enquiries@aquilaheywood.co.uk) or visit our website: <https://www.aquilaheywood.co.uk>