CloverDX

Freeing up engineer time by up to a third with data automation

InsurTech company Zywave provides agencies and insurance companies with tools to fuel their business growth, including cloud-based sales management, client delivery, content and analytics solutions.

They originally looked for an ETL solution to handle their own data migration. Following mergers and acquisitions they had been working with 3 different agency management systems, and needed to migrate to one single system.

Bryan Kahlig, Senior Director, Product Development at Zywave explains: *"What we were looking for was really just a low code approach to solving those problems of migrating data from one system to another. And making it as close to push button as possible."*

But while the initial incentive was just a one-off data migration, Bryan realized that CloverDX had the potential to improve more of Zywave's data processes, specifically the service they offer to new customers to migrate their existing data over to their new Zywave instance.

ZYWAVE
INSURING GROWTH

Client: Zywave

Zywave leads the insurance tech industry, fueling business growth for their partners with the most expansive portfolio of cloud-based sales management, client delivery, content and analytics solutions. Founded in 1995, they now have over 15,000 customers, and their software is used by all the top 100 US insurance firms.

"I thought that we could make this something that reduces the amount of effort we have across the board on all our management system migrations"

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From a one-off data migration to ongoing customer onboarding

The existing migration processes were bespoke, hand-coded and with a massive amount of PHP code that had a lot of technical debt. And there were often complications with customer data onboarding, whether that was difficulty accessing data from another system, or database formats changing over time.

The process hadn't been built with automation holistically considered. Bryan explains: *"There was some automation, but there was still a lot of 'OK, well I do this step, and then I do that step...' and there were maybe 20 steps."*

> **"What I saw was that with CloverDX we could maybe take the last 10 steps out, and just have a push-button process for those steps."**

One of the main results the company wanted to achieve was freeing up engineers' time.

The steps of the pipeline for getting the data from the staging system to production were always the same for every customer, but were taking a lot of time. By automating those manual data steps, the company would be able to drastically speed up the process, and free up engineer time as well.

Bryan's thought process at the time was *"We could just change the way those last 10 steps worked, so we could just push a button and say 'Hey look, all the data is here in our staging system and the CloverDX tool completely manages getting from staging to production'."*

Push a button, and trust the process is going to work

The whole process is now managed with workflows built in CloverDX, so rather than manually working on those manual steps, engineers can push a button, trust the process is going to work, and go and work on the next migration instead.
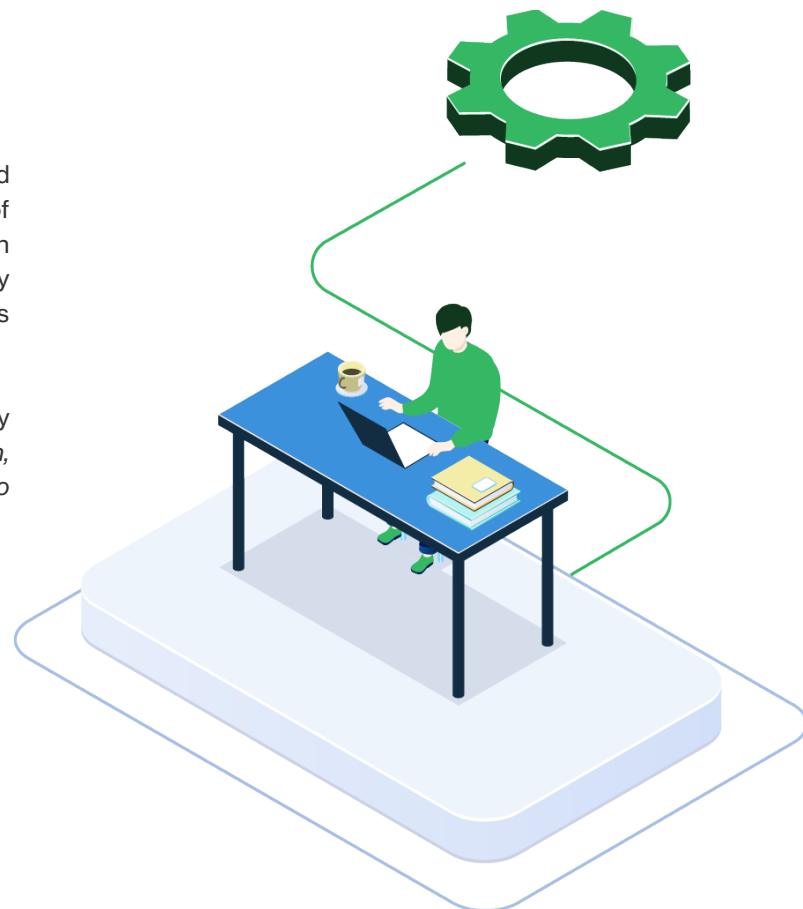
> **"We cut the time it took them to do those conversions by maybe a fourth or a third. When you're talking about 5 days to convert a customer, and this automation takes a day off, that's a pretty big chunk from my perspective."**

Speeding up customer onboarding

Automating the conversions has not only freed up the engineering teams' time, but has enabled the team to work on more tasks at the same time due to how much easier the automation has made the last steps in the process.

And speeding up the process has also meant there's no longer an onboarding bottleneck with the engineering team.

Bryan says *"The onboarding process is our first chance at making a good impression with our customers after the dollars are already spent. And CloverDX gives us a tool to be able to move faster. Being able to reduce by 20% the time it takes for us to do those conversions for new customers is a huge benefit for us."*

Getting across the finish line with the CloverDX team

Zywave also worked with the CloverDX consulting team to help, in Bryan's words, "get us across the finish line."

"We were able to use the tools we build with CloverDX, but it wasn't nearly as sophisticated and mature as what the consultants came in and did."

The CloverDX approach to professional services is always to hand over something that the customer is able to use and work with themselves – something else that Zywave appreciated:

"Our team doesn't feel like it's a black box – the CloverDX engineers we worked with were very careful to make sure they were educating our team along the way."

"The CloverDX engineers wanted to make sure everyone on our side could not only use the tools they build, but could also modify and update them, because we all know that code and requirements change over time."