AI | Data Modernization

Global Insurance Firm

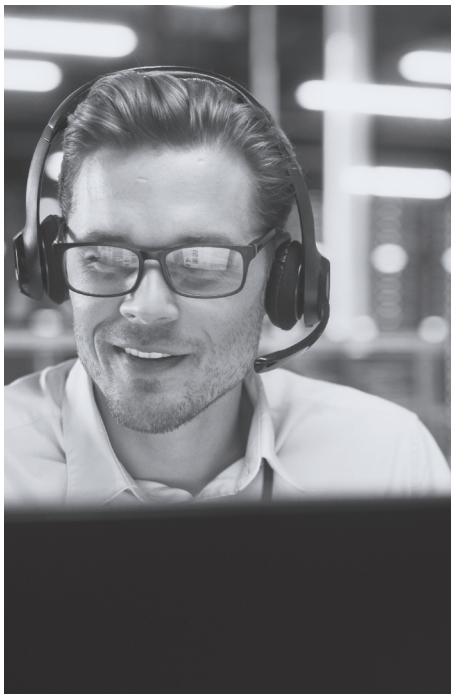
How We Helped a Global Insurance Firm Unlock Legacy Data and Prepare for Scalable Growth

Our client is a global insurance and risk management organization, employing thousands of people across multiple regions As part of an aggressive growth strategy, they have expanded rapidly through mergers and acquisitions.

With each acquisition came more data and much of this data sat in legacy systems, including a central SQL Server based repository. Over time, this created a complex landscape of loosely structured and poorly connected data. Whilst valuable, the data was difficult to navigate, interpret and scale effectively.

The organization recognized the need to modernize and explore a more flexible, scalable platform using MongoDB Atlas. But, before making any decisions they needed clarity on what that transition would involve.

We were approached to provide consultancy support, helping them understand how their data could be migrated, what challenges they could face and how to approach the journey.



Utilized Technology Stack:

Cloud: **Microsoft Azure Sql Server MongoDB Atlas**

Desktop application: **MongoDB's Relational Migrator**

Review of Challenges

The client faced several challenges from the outset; their legacy data repository contained large volumes of loosely structured data with relationships between datasets not always clearly defined. In some cases, these relationships existed as "soft" connections rather than formally enforced database constraints.

At the same time, the business relied on SharePoint interfaces to view data. Any future solution would need to maintain a familiar way for users to interact with the data or provide a practical alternative.

This was not a straightforward delivery project. The client was primarily seeking guidance on how to approach the migration themselves, rather than outsourcing the full implementation.

They needed to understand:

- **The best way to approach migration**
- **The risks involved**
- **The likely timelines**
- **How their data would look and behave in a new environment**

Adding to this complexity were strict legal constraints. The client was unable to share full datasets, schemas, or recordings. This limited visibility and introduced uncertainty into the process.

Our Solution

We focused on providing clarity and practical insights into how the client could approach their migration.

Using MongoDB's Relational Migrator, we explored how elements of the existing SQL data model could be translated into a document based structure. This was not a direct one-to-one conversion but more of a way to help the client understand how their data might be re-organized in MongoDB.

We also worked to replicate key data views that the users relied on, ensuring continuity in how information could be accessed and interpreted. The aim was to provide familiarity for internal users transitioning from the existing system.

Where data had been anonymize or incomplete, we made clear assumptions and positioned outputs as illustrative examples. This ensured transparency while still moving the project forward.

Clarity turned complexity into a practical migration path.

Our Approach

This was a consultancy led engagement, with a strong focus on enabling the client's knowledge.

We worked in a structured but flexible way:

- **Mapping and transforming sample data into MongoDB**
- **Recreating familiar data views for continuity ensuring the users who were working on the old system would see the same "views" providing familiarity for the switch**
- **Clearly documenting assumptions where data was incomplete**
- **Providing hands-on demonstrations of tools and outputs**

A key part of our approach was knowledge transfer.

We ran sessions to walk the client through the process step by step. We also recorded guidance so their internal teams could repeat and scale the migration independently. This ensured the client was not reliant on external support long term.

Subsequent Outcomes

Despite the constraints the project delivered strong results giving the client a clear migration strategy and confidence to move forward.

The client now has:

- **A clear understanding of how their legacy data can be structured in MongoDB**
- **A working example of migrated and transformed data**
- **Visibility of how existing interfaces can be supported or replicated**
- **The knowledge and tools needed to carry out the migration themselves**

What was once an uncertain and complex challenge is now a defined, achievable path forward.

The project was delivered promptly, even with initial delays caused by restricted data access.

Our Approach

Feedback from the client was highly positive.

They shared their satisfaction, highlighting the value of the engagement and the clarity it provided.

The project helped turn a cautious, uncertain starting point into a confident next step.

A key part of our approach was knowledge transfer, enabling the client to scale the migration independently.

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