

Guidelines for Guidewire Cloud Migration Project

Whitepaper

For insurance carriers striving to remain relevant and competitive in an era of rapid technological transformation, migrating to the cloud is no longer optional but essential. All **P&C insurers using Guidewire** as their core self-managed platform must eventually transition to Guidewire Cloud. However, many insurers and system integration (SI) partners mistakenly approach this migration like a new implementation project. This white paper highlights the unique aspects of Guidewire Cloud migration projects and key considerations for success. Note that this white paper focuses on Guidewire core products (not specific to any Xcenter) and excludes digital and data products.

Estimation

As the famous Tamil proverb says, “Muthal Konal Mutrilum Konal” (roughly translated as ‘If the beginning goes wrong, then the entire thing goes wrong’), incorrect project estimation can lead to budget overruns, timeline extensions, or both. Consider the following points to avoid underestimating the project:

The most common mistake is assuming that Guidewire will handle the technical upgrade, fully migrate the codebase to the cloud, and require minimal development work. However, Guidewire only guarantees the Out-Of-The-Box (OOTB) codebase and will address only OOTB-related issues. The SI partner or customer is responsible for verifying and adapting custom code as per customer requirements.

The standard effort split of 50/25/25 for dev/business analyst (BA)/quality analyst (QA) does not apply to migration projects because QA must test all functionalities, even when no

coding changes are involved. Therefore, the resource plan should allocate additional QA efforts accordingly.

BA estimation might seem lower for migration projects since no new requirements are needed. However, if updated requirements are not centralized, BAs may need significant time to gather information from tools like JIRA/Rally, analyze the current system behavior, compare and document the cloud behavior, and confirm the final requirements with stakeholders.

Inception

In a typical **Guidewire implementation project**, SI partners lead the inception by showing the functionalities, process flows, UI/UX, etc., to POs and SMEs and building the backlog. However, in a cloud migration project, roles reverse — customers provide knowledge transfer (KT) to SI partners, explaining their current system and customizations. It's crucial to communicate this early to prepare the business team for demos, KTs, and a smooth inception process.



Backlog Building

A well-crafted backlog is the foundation of any successful project embodying the adage "Well begun is half done." While you can use **Guidewire's SurePath** content to build backlogs, consider these cloud migration-specific factors:

- Customer customizations
- Reconfiguration of integrations for cloud
- Cloud Assurance Assessment (CAA) optimization backlog
- To do items from technical upgrade handover
- Advanced Product Designer (APD) retrofit
- GUnits refactoring
- Archival of inbound and outbound files
- Replacements for non-cloud standard accelerators used in the current version
- If there are no replacements for non-cloud standard accelerators, then the features and stories needed to implement the customized functionality.

Cloud Trained Resources

The success of any Guidewire cloud migration project depends heavily on deploying cloud-trained resources. While finding cloud-experienced resources for all positions is challenging, ensure lead roles are filled with cloud-experienced personnel and provide training for the rest of the team.

- Developers must be aware of cloud standards, cloud best practices, logging, profiling in the cloud, anti-pattern avoidance expertise, etc.
- Integration developers should be familiar with file-based integrations in the cloud, integration gateway, cloud APIs, app events, etc.
- QA teams should have exposure to Guidewire Cloud Console (GCC), Datadog, TeamCity, inbound/outbound utilities, etc.

Starting the project without adequate training can lead to missed milestones and unnecessary delays. Also, all resources must be certified in the cloud version.

Guidewire Cloud standards



Image 1: Guidewire Cloud standards

CAA optimization backlog

Initially, Guidewire shares the CAA optimization backlog when handing over the technical upgrade. This backlog includes a list of technical items that do not meet cloud standards and must be addressed during development. It should be incorporated into the initial project backlog, and throughout the development phase, Guidewire will continue to assess the cloud code base, providing monthly reports. Creating a flexible plan to accommodate new issues identified in these reports is essential to ensure the backlog remains up to date.

When handling the CAA backlog, the following points should be considered to manage it efficiently:

- Communicate identified violations to the production support team early. This helps prevent similar issues from arising during the

production code merge process.

- Plan for CAA items throughout the development process, rather than saving them for the end. This approach ensures the monthly reports reflect steady progress.
- Review the CAA items regularly and assign them to the configuration and integration teams as appropriate. This enables parallel work on these issues and minimizes duplicate efforts or confusion.
- Don't leave all CAA items until the end of the development phase, as this may lead to rework on items that have already been completed.
- Organize and categorize CAA items based on severity and work on them in that order.

CAA optimization backlog categories

Categorization	Remediation Guidance	Timing	Result if Unaddressed
Upgrade Mandatory	Item MUST be addressed	Prior to upgrade to v10	Inability to upgrade to v10
Cloud Mandatory	Item MUST be addressed	Prior to transfer to Guidewire Cloud	Inability to host on Guidewire Cloud
Cloud Optimization	For Guidewire Cloud Operations to meet contractual obligations, the Item requires specific action be taken	Prior to transfer to Guidewire Cloud	Compensating Factors may be offered based on mutual agreement between customer and Guidewire
System Optimization	To achieve a more performant solution or a solution that is best aligned for Fast Cadence, customer should address item	At an appropriate future point in time for customer	System is at risk for additional defects or severe maintenance issues in the future
Technical Debt	It is suggested that item be addressed	At an appropriate future point in time for customer	Not following Guidewire best practices and minor risk of future maintenance issues

Table 1: CAA optimization backlog categories

Business involvement in Integration

In most integration teams, business stakeholders are minimally involved, because they primarily focus on reconfiguring existing integrations for Guidewire Cloud. However, despite the technical nature of these changes, some business-critical inputs must be gathered to ensure the migration meets the business' operational needs.

These critical areas include but are not limited to:

- Masking of personally identifiable information (PII) in inbound and outbound file processing.
- Defining the folder structure for these files, including naming conventions and handling file timestamps.
- Setting up encryption/decryption protocols for the secure transfer of files.
- Determining the automatic file movement schedules.
- Defining batches in the cloud which includes batch names, scheduling of new batches, modification of existing batch schedules, etc.

To avoid last-minute pushbacks or rework after the development is completed, it is highly recommended that business users be involved early in the high-level design process. Walk them through the required changes and gather the necessary business input for these integration points. This proactive approach will help prevent delays and ensure all business needs are met during the development phase itself..

Cadence for production merge and Cloud release update

One of the challenges of any migration project is managing the cadence of production code merges. These merges are necessary to integrate changes from the production environment into the cloud migration. Still, they must be carefully timed to avoid issues like excessive regression testing or conflicts in the codebase. If production merges are done too frequently, the team may spend a disproportionate amount of time on code merge and regression efforts, which can delay the overall migration process.

On the other hand, merging too many changes at once — such as grouping multiple production support releases into one large merge — can cause more significant issues. This “big bang” merge may result in large merge conflicts, which will require substantial effort to resolve, and the risk of breaking existing code increases significantly.

To strike the right balance, it's essential to consider the following factors when choosing the cadence for production merges:

- Frequency of production support releases: If releases occur frequently, more regular merges may be necessary.
- Number of items in each release: Larger releases may require more time for merging, so careful consideration is needed.
- Severity of the release items: Merges that address critical or urgent issues may need to be prioritized.

In addition to these factors, the final production merge cutoff date should be carefully planned. To avoid further complications, it is advisable to freeze the production merges before entering the system integration testing (SIT) phase.

Guidewire may release subsequent cloud Skie versions during the course of the migration. It is optional to update to the latest cloud version during the development phase and some of the cloud updates can be skipped, helping save merging and regression efforts. However, please be informed that Guidewire will allow only up to “n-2” releases (“n” being the latest version) for production. So, it is advisable to decide early, based on the project timelines, on which cloud version the system is going to be in production, and plan the cadence for cloud updates accordingly.

Migrated data testing

Guidewire will handle the database migration to the cloud during the development phase of the migration project. To ensure the system operates correctly with the new cloud infrastructure, it is crucial to complete this data migration before the start of the SIT phase. This allows usage of the migrated production data during the SIT phase, helping identify any data compatibility issues that may arise in the cloud environment.

It is highly recommended that the migrated production data be tested to identify potential issues early, enabling the team to address them before moving into the user acceptance testing (UAT) phase. Any data inconsistencies or issues identified during testing should be resolved promptly to ensure the smooth functioning of the system during UAT.

Business Training for changes in cloud

As the cloud environment introduces changes to processes and user experiences, it's essential to ensure that business users are adequately trained before entering the UAT phase. This training is vital to prevent any last-minute pushback from users who may not be familiar with the cloud interface and functionality.

The following points should be addressed during business users training:

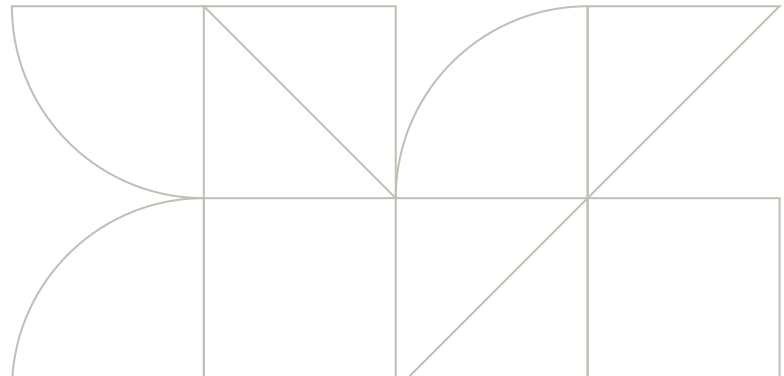
- **Cloud data access:** Users will no longer have direct access to the cloud database. Alternatives such as cloud data access (CDA) or queries using data change scripts should be introduced to help users retrieve necessary data.
- **Log usage:** Users must be familiar with using Datadog to access application logs for troubleshooting purposes.
- **Guidewire Cloud Console (GCC):** Users should be trained on using the Guidewire Cloud Console for monitoring and managing cloud operations.
- **TeamCity:** Introduce TeamCity for continuous integration and delivery processes.
- **UI familiarization:** Periodic demos should be conducted to familiarize business users with the cloud application's user interface (UI).
- **File processing:** Inbound and outbound file processing in the cloud should be explained, including handling archived files for reference.

- **S3 Bucket access:** Users will not have permission to access the GWCP S3 Bucket directly. Instead, they will be able to access archived copies of both inbound and outbound files.
- **Batch processing:** Training should include details on the new batch processing in the cloud.

Providing comprehensive training will help users adapt to the cloud environment and avoid disruptions when using the system during UAT.

Final word

Successfully migrating to the Guidewire cloud is a transformative journey that requires careful planning and adherence to best practices. By following the recommendations and guidelines in this paper, insurance carriers can achieve a smooth and efficient migration, unlocking business value and improving operational efficiency. The migration will enable increased agility, support future growth and innovation, and help carriers thrive in a rapidly evolving digital landscape.



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