



Guy Carpenter

Ensuring Security and Sustainability for Salesforce



Company Overview

Guy Carpenter & Company, LLC is a leading global risk and reinsurance specialist with more than 3,200 professionals in over 60 offices around the world.



Having recently built a custom app inside Salesforce, Guy Carpenter was keen to validate the quality of the build and reassess the feasibility of Salesforce for rebuilding a new version of the app. They asked The Architech Club to examine the existing Salesforce technology, identify risks and make recommendations for a remedial product backlog.

Company Profile



LOCATION	London, UK
EMPLOYEES	3,000
INDUSTRY	Financial Services
SOLUTIONS	Sales, Service, Marketing, Experience Cloud, AppExchange
PROJECT DATE	April 2021

Challenge

- Overuse of contractors and consultants, who have over-engineered Guy Carpenter's Salesforce org, means the system became legacy and costs a great deal to maintain
- Inconsistent design and technology framework
- Excessive coding of solutions
- Lack of privacy compliance
- Technical debt, due to
 - Unused, redundant solutions
 - Historic use of contractors
 - Over-engineering
 - Inadequate handover
- Salesforce was treated as PaaS, not SaaS

Solution

- We commissioned a Solution Architect and a Technical Architect to conduct reviews of the current application
 - Business processes
 - User experience
 - Capabilities
 - Use cases
- Technical assessment
 - Platform and architecture
 - Code quality
 - System maturity
 - Security and compliance
 - Governance
- Executive Summary presentation
- Report of Findings

Results

- We found serious issues with code quality, security and privacy
- We recommended:
 - Prioritising a low-code approach
 - Design standards for pro-code and low-code solutions
 - Coding best practices
 - Technical design authority and Centre of Excellence
- We provided a roadmap including
 - Remedial backlog
 - Governance plan
 - Permissions review
 - Improving code base
 - Brownfield implementation plan