

SOLUTION

CRM (On-premises)
Upgrade

VERTICAL

Insurance
Brokerage

TIME FRAME

2024

SIZE

50,000+ Employees

OBJECTIVE:

Upgrade their customized CRM 2011 installation to a fully patched CRM 2016 version, ensuring compliance with Microsoft Support for future upgrades. The project involved incremental upgrades to CRM 2013 and CRM 2015 before reaching CRM 2016, along with necessary updates to databases, JavaScript, and Scribe Jobs.

Gallagher ranks among the largest insurance brokerage, risk management, and consulting firms globally. With a significant international presence, they employ over 52,000 individuals and offer services in more than 130 countries.

Throughout 2024, we developed a comprehensive plan to upgrade their CRM 2011 installation to CRM 2016, addressing strict data sensitivity, multiple lower environments, and multi-server installations. During the upgrade, many JavaScript files became outdated, and we updated them to current standards, while also facilitating the upgrade of various third-party extensions to ensure compatibility with the new system.