

Design and Build Field Dashboard for a Large Insurance Products Company



Background

The client is one of the largest insurance products company approached Trianz to architect, design and build Field Dashboards using MicroStrategy DW/BI solution for tracking and performance analysis.



Challenges

- ▶ Needed an efficient method to track the performance of branches.
- ▶ Require a centralized system to track activities of representatives.
- ▶ Existing EDW objects not providing optimum performance.
- ▶ Existing system to create per capita comparison scenarios is manual.
- ▶ Needed to resolve recurring user issues when required.



Business Execution Approach

The current usage of the new Legal application includes the following:

- ▶ Built an automated solution to create per capita comparison scenarios, which helps to forecast per capita goals.
- ▶ Incorporated the Model Branch ranking methodology into a systematic solution that allows for the ranking metrics to be incorporated in numerous dashboards and reports. Built a systematic solution to handle rep transfers and rep terminations.
- ▶ Manager dashboards will now include all business activity monitoring including when reps were active in a particular branch.



Technology

Microstrategy, Informatica, Teradata.



Successful Business Results

- ▶ Tables, charts and gauges help the management visually monitor trends and spot exceptions.
- ▶ Self-service capabilities for business analysts for Ad-hoc reports.

About Trianz

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