



Industry

- Financial Services

Products

- Microsoft SQL Server
- Microsoft SQL Server Analysis Services
- Microsoft SQL Server Reporting Services
- Neudesic ETL Framework
- Neudesic SSRS Accelerator

Challenge

Replace archaic paper-based reporting system with a modern, proprietary web portal that would be easy to use, and leverage CBL's existing website for user authentication and secure data access

Solution

An integrated Web application that provides better, more easily accessible information to help CBL's agencies, agents and field partners focus on improving customer retention while decreasing their dependency on the call center for customer information

Benefit

- Access to deep customer information
- Rich reporting and analytics
- Easy to use web interface
- Seamless integration with existing website
- Built-in authentication and data security
- Streamlined ETL of data from existing systems
- Reduced dependency on call center for basic information

Reporting and Analytics Web Application

Colorado Bankers Life Insurance Company, headquartered in Greenwood Village, Colorado, is a life insurance subsidiary of Health Care Service Corporation, one of the largest non-investor owned health care providers in the United States. CBL underwrites individual life, accident and critical illness products, distributed primarily through payroll deduction, federal, postal and military allotments, state and local government payroll systems, and individual bank draft billing.

Since it was founded in 1974, CBL has worked with thousands of American business owners to offer reliable payroll deduction programs that give employees a convenient, affordable way to protect themselves and their families without cost or obligation to their employers.

I have one word to say. Awesome. I love the details that I get to see. Congratulations on an outstanding job. You guys just made me one happy camper. I really appreciate the time and money that the company spent on this. Believe me, it will pay off tenfold.

*Top Producing Agent
Colorado Bankers Life Insurance Co.*

Project Highlights

- Colorado Bankers Life needed to empower its agency network by providing better, more easily accessible information
- Working closely with IT to source data from existing systems, Neudesic's team designed a robust data mart and integrated portal
- Timing was critical because the company wanted the complete solution delivered before an upcoming conference
- Neudesic provided interactive dashboards customized for individual agencies and agents
- Leveraging CBL's existing infrastructure and authentication process, Neudesic created a single integrated web application for CBL's 4,000+ insurance agencies, agents and field partners
- Neudesic developed a unique strategy to secure all system data and exports
- Neudesic delivered the solution in time for CBL's leadership conference



Reporting and Analytics Web Application

The Challenge

CBL needed to empower its agency network by providing immediate persistency information and other business metrics so agents and partner agencies would be able to focus on improving customer retention. Network enhancements also would ease dependency on the company's call center for customer information. In addition, CBL wanted to track agent performance in order to make better decisions and follow through on strategy changes.

The company's previous processes included archaic paper-based reporting and sluggish access to a mainframe customer information system. It was clear that CBL needed a modern, proprietary web portal – an intuitive solution that would require little training for the company's nationwide network of agents and agencies. Ideally, CBL would be able to leverage its existing Web site for user authentication and secure data access. The entire solution would require data warehouse design and management, and data migration from the company's existing mainframe. Because CBL wanted the complete solution delivered for an upcoming leadership conference, adherence to a strict time line was critical.

The Solution

Neudesic created a single integrated Web application for CBL's 4,000+ insurance agencies, agents and field partners. The entire solution was integrated into the company's Web site, leveraging existing infrastructure and authentication.

Neudesic's Reporting Framework uses SQL Server Reporting Services to deliver a common 'look and feel' and on-line help across all reports. Gauges and charts available in SSRS provide interactive dashboards customized for individual agencies and agents. All the information includes extensive drill down capabilities.

CBL uses SSRS to monitor its business with company-wide and agency-specific reports. SQL Server Analysis Services is used to calculate business metrics and provide analysis capabilities for internal users, who navigate all of the information available to them through Excel.

Working closely with CBL's IT staff to source data from existing systems, Neudesic's team designed the solution to include a robust data mart and integrated portal. Neudesic's ETL Framework streamlines the extraction, transformation and load processes, and brings CBL personnel up to speed quickly with SQL Server Integration Services. Neudesic also leveraged SQL Server encryption features to secure all sensitive CBL system data and reports.

The solution was delivered in time for CBL's leadership conference. Neudesic plans to market a similar solution to other insurance agencies and related industries.

The Benefit

By providing accessibility and insight into business information, Neudesic's solution has profoundly impacted both CBL and its customers. Dashboards deliver rich information that was unavailable in the company's previous reporting environment, allowing agencies and agents to navigate their organizations in new, more efficient ways. A number of internal reports were also delivered as management tools, providing insight into persistency, policies-not-taken, and paid premium. CBL uses Microsoft Excel and pivot tables to navigate the data for ad-hoc analysis and produce its own reports.

I have to say that Neudesic hit a grand slam home run. The site is easy to get around, full of data, and the reports are laid out in ways that will allow us to micromanage our business.

*Top Producing Agent
Colorado Bankers Life Insurance Co.*

In an industry where antiquated paper-based and legacy mainframe reporting methods are still common, Neudesic's solution gives CBL a huge competitive advantage.