



## DATA INTEGRATION



SwissLife

Delivering a near real time, consistent view of customer data to sales people, service agents and customers with Qlik Talend.



“Vision 360 serves as the foundational building block of our multi-channel and digital strategies and Qlik Replicate plays a central role in these.”

- Christian Phan-Trong, Architecture Director, Swiss Life France

Swiss Life is a major provider of insurance and wealth management. It offers individuals and corporations comprehensive advice plus a broad range of products and services including life insurance, private banking, financial management, health, disability, property and casualty insurance. Swiss Life France, renowned as a private insurer, supports its customers throughout their lives, with personalized advice and tailored solutions to help them live a longer self-determined life.

### The Vision

To provide the highest levels of customer service, Swiss Life France initiated a project dubbed 'Vision 360'. The objective of this initiative is to aggregate customer data from Swiss Life France's backend systems into a search engine index to provide a single, consistent view of customer data to all channels and consumers of this data.

Before Vision 360, every Swiss Life portal directly accessed the back ends individually and built its own custom view of the customer data. Since each portal did this in a slightly different way, the information presented for a single customer was usually varied between two portals, resulting in confusion for customers, sales people and employees alike.

### Customer Information: Creating a single version of the truth through data replication

Vision 360's architecture was designed to leverage a data replication solution with change data capture (CDC) technology which would take information from Swiss Life's DB2/z mainframe to an Oracle database used to feed an Elasticsearch search engine serving requests from portals and multi-device applications.

### ABOUT SWISS LIFE

Swiss Life is a major provider of insurance and wealth management. In the French market, its position as a private insurer is renowned.

To deliver more consistent information to customers, service and sales, Swiss Life France launched a project called Vision 360. Its goal is to aggregate customer data from Swiss Life's backend systems into a central search and retrieve data index to provide a single, consistent view of customer information to all channels and consumers.

With Qlik Replicate, Swiss Life moves data in near-real time from its DB2/z mainframe to an Oracle database used to feed an Elasticsearch search engine serving requests from portals and multi-device applications.

This solution eliminated the need for significant development work to modify backend applications and currently enables Swiss Life's multi-channel and digital strategies.

### Objective

To create a consistent multi-channel view of customers that can be leveraged by portals, mobile applications, analytics, and more. The 'Vision 360' initiative was designed to send backend data in near real-time to an Elastic Search Engine index.

### Solution

Qlik Replicate enables Swiss Life France to replicate data in near real time from their DB2/z mainframe to an Oracle target from which the Elasticsearch index is fed.

With this design in mind, the Swiss Life team began to evaluate Change Data Capture replication solutions. Key selection criteria included both the comprehensiveness of the offering and also the ease of implementation. "After looking at the other options, we concluded that Qlik was the best choice because it was the simplest to configure, connect, and maintain," said Christian Phan-Trong, Architecture Director. Swiss Life conducted a three-day proof of concept and decided to move forward with Qlik Replicate.

The Qlik Replicate installation took only a couple of days. "Our project team developed a good relationship with Qlik Professional Services. One of Qlik's great strengths is its proximity to customers. At Swiss Life, we like to know our vendors in person," said Christian Phan-Trong. Once the product was up and running, the Swiss Life team validated the whole chain from the mainframe all the way through to the Oracle Database, allowing to feed the Elasticsearch index.

### **Qlik Replicate accelerates the path to success**

Qlik Replicate accelerated completion of the Vision 360 project: "Without Qlik, we would have had to modify our backend applications to propagate data updates in real-time outside the mainframe. For this reason, without Qlik, we could not have done the project since it would have been too costly for us in terms of development work. We would have been forced to give up on our real-time data propagation requirement," said Christian Phan-Trong.

Now customers can access information about their life insurance and other policies via the web portal or their smartphone and tablet application. This functionality has also been extended to other business lines and will be further enriched with information about past interactions. The distributors also access this information through their new, dedicated portal. And soon, the project will enable access to the same information for service agents.

Looking ahead, Vision 360 and Qlik are set to play a role in the company's Big Data analytics initiative and Qlik's solutions are being considered by other European branches outside of this one.

"Qlik is unique because data replication is their core business and they are thus able to deal with high priority customer challenges quickly and knowledgeably. In addition, Qlik's solutions are more efficient and attractive than the other alternative that we considered on the market."

- Christian Phan-Trong, Architecture Director, Swiss Life France



## **About Qlik**

Qlik transforms complex data landscapes into actionable insights, driving strategic business outcomes. Serving over 40,000 global customers, our portfolio leverages advanced, enterprise-grade AI/ML and pervasive data quality. We excel in data integration and governance, offering comprehensive solutions that work with diverse data sources. Intuitive and real-time analytics from Qlik uncover hidden patterns, empowering teams to address complex challenges and seize new opportunities. Our AI/ML tools, both practical and scalable, lead to better decisions, faster. As strategic partners, our platform-agnostic technology and expertise make our customers more competitive.

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