

Colonial Life improves visibility into customer data with QlikView

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Bryan Allen, AVP, Business Intelligence & Analysis Services, Colonial Life

Colonial Life, an affiliate of Unum Group, is a market leader in providing benefits solutions in one neat package: excellence in communications, enrollments, service, and personal insurance products and services that make benefits count for employers and their employees alike.



For employees whose insurance plans leave them feeling vulnerable, Colonial Life can help restore peace of mind through personal insurance products that complete their coverage. Headquartered in Columbia, S.C., and founded in 1939, Colonial Life offers a broad line of personal insurance products including disability, accident, life, cancer, critical illness, hospital confinement and limited benefit medical coverage.

In 2005, the company's Business Intelligence and IT groups decided to provide improved analytic and reporting capabilities to its user community. However, it was imperative for user acceptance of any solution that it be as easy to use as possible at all skill levels. In addition, high transaction volumes among the company's 60,000+ customer accounts meant that the chosen solution needed to aggregate information quickly and completely to facilitate decision-making.

A visit to a data warehousing conference brought QlikView to the attention of Bryan Allen, the company's Assistant Vice President of Business Intelligence. "We saw immediate possibilities with QlikView," recalls Allen, "particularly in its ability to work with large data sets. And the price point compared to similar solutions made it extremely accessible for our budget-conscious business intelligence program. We wanted to get our hands on it right away."

After an evaluation process put six tools through their paces, the Colonial Life team ultimately selected QlikView based on their capabilities, ease of use, and performance. Since then, nearly 100 QlikView applications have been deployed across the company, with 400 internal users able to quickly analyze data volumes up to 50 million lines.

Solution Overview

Colonial Life

Colonial Life is one of the nation's leading providers of voluntary worksite benefits.

Industry

Insurance/Financial Services

Function

Sales, Marketing, Operations, Finance and HR

Geography

United States

Challenges

Provide a new platform for providing BI capabilities across the business, including:

- Improving the understanding of sales and customer data from enrollment systems.
- Provide timely and accurate departmental expense information and variance analysis.
- Provide its agency sales organization a differentiated toolset of sales performance metrics in support of top-line growth targets.

Solution

Colonial Life has deployed QlikView to 400 internal users, deploying nearly 100 applications since 2005. With QlikView Server (64-bit). The company has provided online access to sales and customer data to more than 7,800 sales agents, creating greater efficiency in enrollment and renewal processes.

Benefits

- Embraced by business community with minimal IT support needed
- More than 100 QlikView applications deployed enterprise wide
- More than 100 production applications used for "one offs" (data comparison processes, quick analyses)
- Use of product in novel ways to increase business efficiency and productivity

Data Source Systems

Application: Harmony Online

Database: SQL Server, DB2, Teradata, Access, Excel spreadsheets

Hardware: IBM iSeries Mainframe

Visibility into customer and sales data

Colonial Life offers customers state-of-the-art, flexible enrollment capabilities. The company's web-based Harmony enrollment system allows not only enrollment, but field-based configuration and setup for each case. This system supports Colonial Life's 7,800+ agents and brokers.

Harmony quickly became a differentiator for Colonial Life, with field agents able to present products to customers and enroll them from the same application. However, a solution needed to be developed to support Harmony reporting to provide sales, marketing and finance teams with a comprehensive analysis of the data across product offerings, geographies and other key indicators. Harmony reporting using QlikView quickly filled the gap.

Sales reporting

The SMRT application provides visibility into sales performance metrics for Colonial Life's sales management team. Users can now view details on sales performance based on the sales hierarchy, time frame, product line, top performers and perform trending analysis that has helped the company in its planning process.

Colonial Life's BI team has also used QlikView applications to deliver much-needed visibility into customer infor-

mation to their extensive network of independent agents and brokers. While not employees of the company, the agents needed accurate details on customer buying trends and payment status to plan their own sales and service strategies. The Producer Scorecard application allows agents to see progress on their individual sales objectives and their goals.

Operations support

QlikView has also been used to create internal dashboards with "actionable" work queues and display metrics. The Account Services Dashboard allows service personnel to pinpoint customers' payment behavior, so that they can take action for customers who are slow to pay and organizes data by management area, so that specific managers can take action. The application provides these results with a few clicks, replacing a paper-based system that was already out of date by the time the reports were distributed throughout the area. The new application has improved average payment past-due frequencies by X%.

Alleviating budgeting headaches

Colonial Life was intent on enhancing its budget and expense analysis capabilities for its senior management, finance staff, and budget coordinators. The expense reporting process had become unwieldy. It was time- and resource-intensive, issues existed with enterprise system integration, research capabilities

were very limited, and there were information gaps in key subject areas.

The Business Intelligence and Finance organizations envisioned an expense reporting application built with QlikView as a solution to these headaches and set out to build it. The application was released in 2007 and enables management, finance staff, and budget coordinators to:

- Stay abreast of current month, QTD, and YTD departmental budget and actual expenses in a user friendly system.
- Use drill-down capabilities to research expenses at a detail transaction level.
- Reconcile budget and actual headcount.
- Efficiently identify inaccuracies in expense transactions.
- And, improve the planning and budgeting process through better data quality, upgraded variance analysis features, and by enhancing expense forecast capabilities.

The application has drawn rave reviews from Colonial Life's management team and is a central element in its expense management process. Thanks to QlikView, there is significantly less time spent tediously compiling expense information and more time in efficiently analyzing expense results.

“ QlikView is a tool our business areas have embraced. Although the product has extensive capabilities and performance, its straight-forward design and build process has allowed our business to get immediate benefit and value. ”

Phil Johnston, Director, Information Technology, Colonial Life