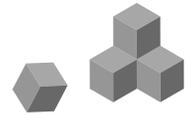# Basler Versicherungen gets complete view of customer data

80
self-service BI applications

360
degree view of each customer

3500+
employees can effectively log and manage time

Challenge

Basler Versicherungen employs more than 3,500 professionals and is the Swiss subsidiary of the Baloise Group, a financial services firm that specializes in insurance, pension, and banking services.

Basler Versicherungen, Baloise's largest unit is currently one of the leading commercial and personal insurance providers in Switzerland and serves a client base that includes private individuals, small and mid-sized companies, and select industrial firms.

It sells its life, auto, and other insurance products through its own sales force, as well as through a small network of third-party sales partners.

In the past, the company faced several operational challenges. Among them was limited visibility into the performance of the more than 650 brokers who sell its insurance products and drive more than 30 percent of the company's revenue.

Basler's staff also lacked a complete view of customer activity, which hindered service delivery and prevented them from identifying cross-selling opportunities. The company needed to improve access to vital and timely information contained in its corporate systems.

Solution

Basler has a long and successful history using Information Builders (ibi) products. The company leverages 80 distinct applications, all built on the ibi analytics platform. This helps Basler achieve full transparency into the organization and enables it to efficiently run all facets of its business.

For example, a comprehensive broker cockpit facilitates comprehensive performance visibility and management across the entire landscape of third-party sales partners, while renewal reports help Basler's own sales forces to better initiate and track policy renewals. Account managers can provide better service and identify cross-selling opportunities more rapidly by obtaining a 360-degree view of each customer. Additionally, more than 3,500 employees can more effectively log and manage their time.

Basler Versicherungen

Industry: Insurance

Basler Versicherungen, a subsidiary of the Baloise Group, is the fourth largest provider of personal and commercial insurance in Switzerland.

The company's expansive use of the ibi analytics platform has not only increased the productivity of both IT and business professionals, but also helped the company improve core business activities, such as the development of new products and successful sales strategies.

Leveraging the ibi platform, the company created a variety of applications and made them available to business users on the company's intranet site. One of them was the broker cockpit, which empowers account managers to more proactively monitor and enhance broker performance.

Because of the limited visibility into their activities, managers struggled to precisely assess the performance of the independent sales agents they oversee. With ibi analytics platform, a tabbed dashboard now provides deep insight into all broker operations. Managers can accurately evaluate broker performance by four key criteria – profit, potential, quality, and margins – and compare the performance of each agent against that of their peers.

Account managers can compile compound reports about the brokers' sales activities to present at management meetings. They can also use the dashboard to upload and organize documents, such as new policies, competitive information, and government and regulatory guidelines, for easy retrieval.

> **>> "Our ability to service our customers has greatly improved with WebFOCUS [part of ibi's analytics platform] now that we can quickly retrieve information whenever we need it."**
>
> **Markus Jaegle, IT Specialists, Basler Versicherungen**

Another application – one of the most critical – supports customer relationship management. Previously, a single, consolidated view of each client across all product lines was nearly impossible to achieve. Thanks to ibi analytics platform, agents, brokers, account managers, and other employees can now obtain comprehensive visibility into each client and their history. Ten different reports, built with the ibi Analytics Anywhere feature, provide customer data from different perspectives, allowing users to analyze what policies clients hold, what transactions they may have conducted with the company's Retail Banking division, and other crucial factors from any mobile device.

"Our ability to service our customers has greatly improved now that we can quickly retrieve this information whenever we need it," said Markus Jaegle, one of Basler's IT specialists. "Even more advantageous is our ability to use that information to identify opportunities to boost revenues by cross-selling additional products and services to our clients."

Benefits

The success of the first two BI initiatives prompted Basler to roll out other applications. One aids agents in the renewal process. Through an intuitive web interface, they can easily initiate, track, and manage the policy renewal process from end to end.

Before these new applications were available, employees struggled to get the information they needed to perform their jobs more efficiently. They were forced to manually gather data from seven or more back-end systems, and then consolidate that information into Excel spreadsheets, where they could conduct further manipulation and analysis. "It was a very cumbersome process that wasted a tremendous amount of time," Jaegle claimed. "Now with ibi, they can get the data they need in just minutes, with just a few clicks."

Employees also rely on a new system to enter and track their time and attendance. To date, it is the largest solution created by Basler with the ibi analytics platform, used by all staff members. It allows them to see when employees arrive to work, when they leave, and when they take breaks. The system also enables them to monitor their use of sick and vacation days.

In the new environment, the organization moved information from those operational systems was moved into corporate-wide Oracle and SAP BW data warehouses, as well as individual data marts, designed to support specific departments and business units, such as finance, customer service, and claims. All data warehouses and marts, as well as the ibi platform, are running on the same UNIX platform as the back-end databases, creating complete cohesion among the entire infrastructure. Additionally, ibi's seamless integration with Basler's own internal security architecture helps to keep confidential corporate data fully protected from unauthorized viewing at all times.

The company's IT team, more than 150 members strong, is also more productive with the help of the ibi platform. Its user-friendly, drag-and-drop interface is far more efficient than previous development methods and helps the department to accelerate the rollout of the new reporting application to end users.

ibi's Maintain feature further enhances efficiency, extending BI applications with transactional capabilities. Several of the reporting solutions currently deployed at Basler, including the wide-scale time management system, allow end users to not only retrieve information, but also update, change, or add to it by altering data directly in its original source.

Jaegle considers their solution to be a work in progress. "We are always looking for ways to make the applications better. We will be upgrading to new versions of ibi's analytics platform as they become available, so we can take advantage of new capabilities," he concluded.

>> "We will be upgrading to new versions of WebFOCUS [part of ibi's analytics platform] as they become available, so we can take advantage of new capabilities."

Markus Jaegle, IT Specialists, Basler Versicherungen

About ibi

ibi is a data and analytics software company that embeds intelligence into — everything. From the beginning, ibi has known the importance of data and insights to make better decisions. We help organizations get their complex and disconnected data in order, so they can build, embed, and automate intelligence into everything they do. By preparing organizations for the future and turning them into builders – information builders – everyone can use enterprise trusted data at scale to drive their growth. Whether our customers use pre-built applications or build their own solutions for their data and analytics challenges, ibi powers their innovation and reinvention. ibi's open platform and industry-specific building blocks accelerate speed to market, improve operational efficiency, and enhance their customers' experience.

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