

Case Study

How a P&C Insurance Company Modernized its Unwieldy Data Management Strategy



datAvail

BI/Analytics • Applications • Databases



Introduction

"It's very much a business decision," says Tom Hoblitzell, Vice President of Data Management for Datavail. He was speaking about the inquiries and research Datavail conducted on behalf of its client, a property and casualty insurance company (the Company).

While the VP was confident that Datavail could provide the full scope of technical services the project might call for, Hoblitzell also knew any result would have to respond to all the client's needs to be considered a success. And even though Datavail was already a contractor to this client for database administration purposes, he also knew that the digital organization would have to prove its chops on the larger platform of systems overhaul and modernization. Ultimately, the client had to decide that Datavail was the right partner for the job if it intended to achieve its long-term goal of being a truly data-driven enterprise.

In the end, the client was more than pleased. The CIO had been in the industry for 36 years and was very complimentary of the evolved partnership between the two enterprises. He spoke especially highly of Datavail's comprehensive knowledge and expertise in data analytics and all the systems that feed into that now-critical business information ecosystem. "It's more significant now than ever to have a partner that's really good in [data architecture, pipelines, cloud enablement, data security] and vision," he said; "that's what made it easy to partner with Datavail."

In this case study, Datavail reveals how it discovered the nuances and challenges buried deep in the Company's systems, designed a modernized solution that addressed the problems while improving productivity, and implemented and completed the project within a reasonable (and achieved) budget and timeframe.

The Company

For over 160 years, the Company has provided insurance and casualty products to customers from all walks of life and in all industries. It insured businesses as they moved West after the American Civil War. It added off-shore assets by appointing an agent in London, England, in 1886. It branched out with new agencies and lines of coverage, including issuing some of the first auto policies in Detroit in 1915. The list of its accomplishments continues: the Company is now focused on domestic business operating in Commercial Lines in all continental states and Personal Lines in 20 states.

The Concerns

Fundamentally, the CIO was very aware of how the Company's legacy systems were hampering business activities. He himself has technical expertise in a dozen sophisticated data system practices, including Enterprise Data Management, Cloud & Digital Transformation, and IT Operations. He could see how the embedded bottlenecks and inefficiency in their technology had accumulated over the course of decades. And as a leader, of course, he wanted to save costs and improve productivity. But he also wanted a strategy for the future, so the Company's business units and the enterprise as a whole would be prepared to manage emerging insurance and related issues evolving in the marketplace.

The challenges to his plan were many:

- The myriad number of different solutions and technologies across business verticals were trying to achieve the same goals, and even though a cohesive data strategy was underway, there wasn't a way to get a bird's eye view of corporate operations as a whole.
- Legacy tech wasn't able to manage emerging programming, compliance, or governance requirements, nor could it provide the granular data information he wanted to see. In particular, its ETL systems (Extract, Transform, Load) were a problem since they weren't designed to address all the various data forms and formats that were routinely flowing into corporate databanks.
- He wanted every business unit to have access to self-service tools, but the organization's monolithic business analytics programming prohibited that option.

In short, the company had gotten as far along as it could on its legacy tech assets, and it was now time to modernize and evolve to access all those as-yet unexplored opportunities.



Datavail's Capacities

As an established partner-vendor, Datavail had already demonstrated its high-quality database management services. For this project, Hoblitzell knew it also had the on- and off-shore resources capable of delivering best-in-the-industry modernization services, including:

- data mapping capabilities,
- systems design expertise,
- system build, code, and testing abilities,
- data management services,
- fully mature business intelligence skills, and
- digital ETL, data storage, reporting, and analytics tools capable of flexing as the Company scaled or contracted.

Additionally, Hoblitzell understood that the magnitude of the finished solution would also require support and maintenance. The Analytics market is constantly fluctuating as Big Data, Cloud, and Data Science capacities evolve. Strategies that can manage issues arising from poor data quality, continuous intelligence inputs, and the exploding volume of information, in general, require a comprehensive foundation if they're to prove their worth over the long term. Datavail knew it couldn't simply build and implement the solution to achieve its clients' goals; it also had to maintain that level of excellence going forward.

Datavail's Proposal

Datavail's proposed strategy encompassed applying its unique constellation of resources to the Company's specific requirements through a flexible pricing approach and over a reasonable timeframe.

Although familiar with its database needs, Datavail was not fully aware of how the Company utilized its other technologies to accomplish its goals. Hoblitzell's initial assessment recognized the Company's:

- newly prioritized need for data management and maximization, and
- its concerns about
 - mismatched programming,
 - a myriad number of technical platforms,
 - fading legacy systems, and
 - an inability to adapt to emerging tech that would facilitate an embrace of emerging opportunities.

He was also aware of the Company's need for cost efficiencies while developing, implementing, and running the new systems, as well as the need for its and its subsidiaries' tech strategies to be flexible and scalable.

Accordingly, as is usual within Datavail's ordinary course of business, Hoblitzell's first step was to thoroughly analyze all technical operations across the organization. The exercise would give him an inventory of existing tools, identify gaps and failures within processes, and clarify which cloud assets and systems best suited the intended operational capacity of the modernized enterprise.

Hoblitzell's intent throughout the analysis was to generate and build into the overarching project a series of 'Systems of Insight,' so each step of the reconfiguration would eventually deliver more, and more valuable, information to better inform the operational whole.



Existing Systems Challenges

As the Company had evolved, so had its variety of disparate tools. Individual business units took on programming that responded to their business demands while developing a comprehensive data strategy.

Consequently, the Company found itself with a long laundry list of technical capacities and configurations, many of which could not serve its needs as a single organization:

- It had already determined to retire some or all of its Oracle Business Intelligence Enterprise Edition, Hyperion Interactive Reporting, Essbase, and Business Objects programming. It had already moved into elements of Power BI, Hadoop, and Informatica. Replacing those gaps would be necessary.
- It had also recognized how the unique demands of multiple business units required close partnerships and a shared vision while enabling governance and autonomy.

Hoblitzell's evaluation confirmed that the Company lacked a holistic view of its data strategy. However, it also had a variety of existing tools that could be brought forward into the task, and Datavail offers access and support for additional cloud-based tools that would fill in the blanks and smooth the road ahead. He also knew that Datavail's ETL expertise (with all of the tools the Company was already using) was more than capable of meeting that aspect of the Company's needs.



Further, Hoblitzell was confident that Datavail's exceptional Data Management suite of services was uniquely designed to respond precisely to the needs of this client:



Tracking Data Analytics Trends

Datavail pays close attention to how emerging technologies and digital systems impact existing assets and configurations:

- Persisted data grows and changes.
- Emerging data comes in unique new forms.
- Big Data volumes, in general, pose challenges.
- Data governance is becoming more unwieldy every day.

Tomorrow's data processing and management systems must encompass both legacy and cutting-edge aspects of data usage and the systems that drive it.

Managing Data to Meet Business Needs

The best use of data is to achieve corporate goals. Datavail's information, performance, and governance programming tie directly to company KPIs by monitoring activities, alerting to concerns, and ensuring that the efforts of both people and production are aligned with corporate strategies.

Architecting the Systems of Insight that Drive Value

A well-designed journey from data collection through integration to implementation converts incoming information into insights while also facilitating dynamic adjustments as circumstances change. It also feeds the analytics programming that provides descriptive, diagnostic, prescriptive, and predictive analytics to build in efficiencies and improve productivity.

Achieving Business Intelligence Maturity

Not least, Hoblitzell cued into the Company's desire to achieve 'business intelligence maturity.' More than just using its data to run and oversee daily operations. The Company ultimately wanted to harness its information assets to create market agility and differentiate itself from its competitors. Hoblitzell saw how it had progressed along that journey in some areas but not in others:

- Most business units were doing well with their data, both managing day-to-day affairs and also measuring periodic advances and developments.
- Others had integrated at least some of their management information with their performance information to produce more meaningful decisions.
- There were some examples of units using their data to encourage and embrace innovation which would be a needed step to achieve the Company's asserted 'market agility' and 'differentiation' goals.

After reviewing the assessment and Datavail's extensive list of responsive services and capacities, the Company agreed to its proposal. Datavail would provide:

- An on- and off-shore service delivery model with U.S.-based technical and project management leads to ensure alignment with project initiatives and adherence to global standards, and remote-based ETL software and systems engineers to reduce production costs.
- An agile approach, consisting of periods for planning, scrums, and sprints.
- A fixed price engagement that reflected a pool of resources that included:
 - all skillsets needed,
 - a scalable team populated by as many developers as were needed, and
 - insights and advice at all points in time, from strategic to operational.
- Both 'run' and 'maintain' services during and after implementing the 'final' iteration (recognizing that there is no 'final' in systems evolution).
- An economy of scale that results in a volume discount reducing hourly rates as work volumes increase.





The Re-envisioning Solution

Fundamentally, the solution involved determining several factors:

- what data capacities the Company already had,
- the tools it was using to collect, clean, integrate, and manage that information,
- the ultimate purpose of the data, and
- whether the data gathered actually responded to the Company's needs.

Information gleaned from the research helped identify which Company assets could or should move to the cloud and, once those decisions were made, how the moves would impact both the legacy- and cloud-based functions.

Over time, Datavail's investigations revealed:

- where gaps in data/platforms existed,
- where gaps in services existed, which could leave business processes in limbo, and
- where data could assist in data management maturity and strategic vision.



Datavail started small by assuming 'run, maintain, and support' responsibilities for a few months on just one of the Company's platforms. Addressing support issues within the one platform gave insight into concerns arising on other platforms. Reprogramming to improve functionality on one platform sometimes necessitated reprogramming elements on different platforms so they could function better together. The strategy gave Datavail access and exposure to the Company's more extensive system as a whole while also giving it latitude to begin making initial, foundational changes in the smaller arena.

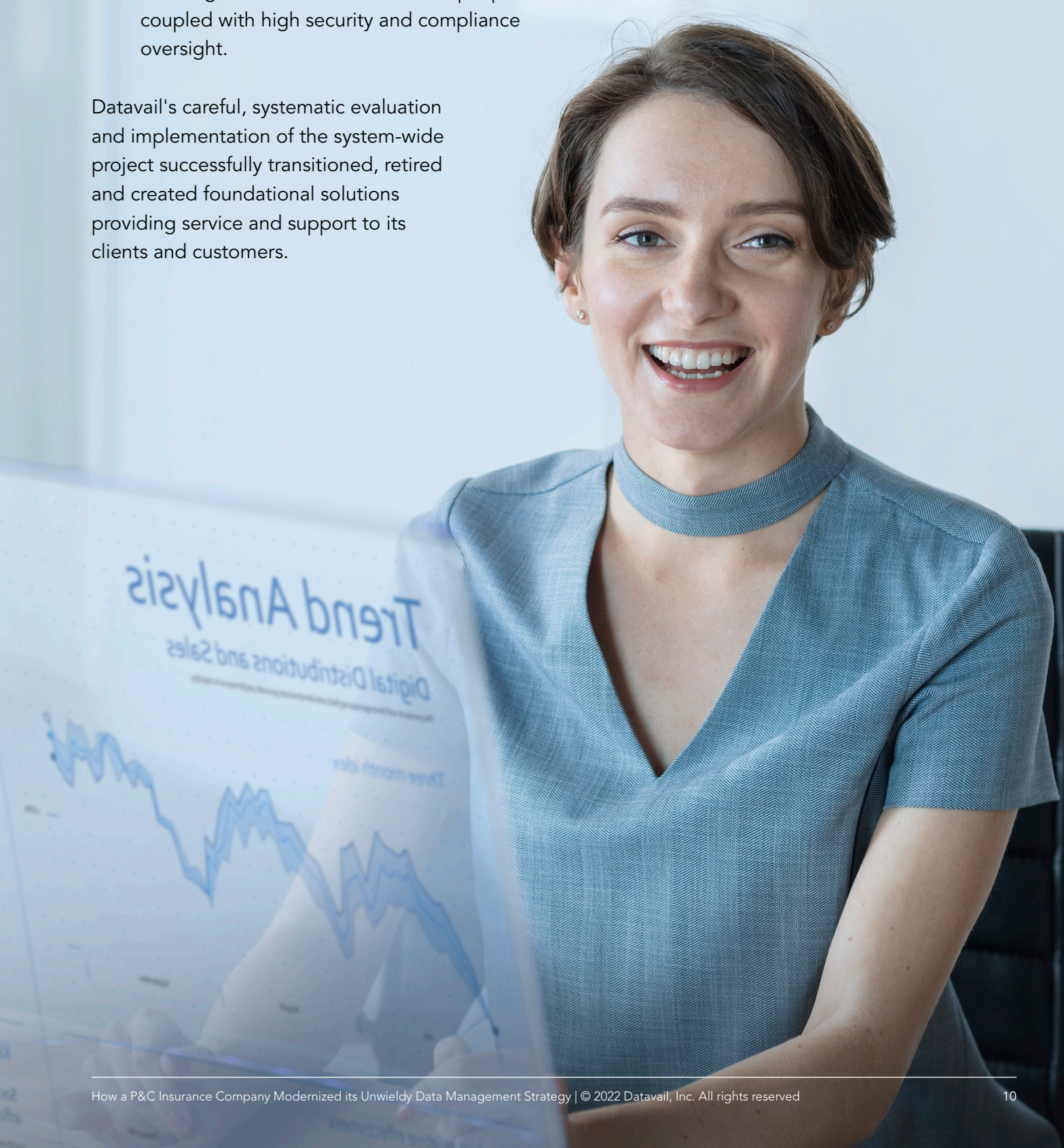
Eventually, Datavail took on the same support services for the Company's other platforms, beginning with support services. Using traditional communications tools (ServiceNow, Email, etc.), the service provider offered 24/7 support across the Company's enterprise that absorbed every emerging issue as it arose:

- In those cases where the Company was retiring assets, Datavail provided sufficient support to move them through that sunseting process and into the new digital platform options.
- The digital services provider addressed visualization challenges by transitioning data from on-premises servers into cloud assets capable of providing those increasingly critical business intelligence tools across the enterprise.
- Analytics took on many forms, as developers analyzed their efforts to appropriately connect their programming activities to the needs of the Company, while the more autonomous analytics programs kept watch over Company functions.

At all points of the project, Hoblitzell kept his eye on the Company's stated goals for its technology infrastructure:

- stability within its global data management operations;
- operational excellence at all vertical levels of the corporation and across all individual business units, and
- ensuring maximum value from multiple platforms, coupled with high security and compliance oversight.

Datavail's careful, systematic evaluation and implementation of the system-wide project successfully transitioned, retired and created foundational solutions providing service and support to its clients and customers.





The Conclusion of the Project but the Continuation of a Beautiful Partnership

By the time the overarching project was complete - data had moved, systems were sunset/optimized, and operations were stabilized - the Company and Datavail had developed a partnership that went well beyond their contractor/contractee relationship.

By all accounts, the Company, which had been adamant that its chosen contractor support its operations, and strategy and vision, was very pleased with how Datavail's deep expertise and technical capabilities helped it move into its new cloud-forward configuration:

- Having a single partner capable of assisting with all of its platforms reduced significant anxiety in the C-Suite. Datavail's deep knowledge of each individual platform provided the Company with the assurance that it had made the right partner-vendor choice. Datavail's comprehension of how those platforms unite their disparate systems into a unified whole assures the Company that it will continue to receive the same reliable, consistent, and top-value inputs from its services provider in the future.
- Datavail's fluidity in adapting to the Company's environment was also a plus. Rather than suggesting different ways of doing business, the Datavail team embraced the Company's operational strategies and adapted the technology to be the backbone needed to support them.

- The Company also recognizes now that its data management and analytics programming are in good hands on a day-to-day basis, as any problems that arise are quickly resolved. Datavail's support services also absorb emerging information and opportunities as those appear, ensuring that the Company has the information it needs to make up-to-the-minute decisions based on streaming data.
- Also, the Company-wide adoption of Power BI was critical. The program's self-service reporting capacity is especially highly valued, and Datavail's real-time coaching of staff allowed the organization to quickly mature its capabilities.

Company management embraces the newfound partnership, too. Datavail's role has expanded well beyond its original status as the 'lift and shift' contractor. In its new role as the ongoing maintenance services provider, Datavail understands both the fundamental and nuanced elements of how the Company and its business units run, and can ensure that all programming maintains those parameters. Its strategic architectural and systematic design closely followed the Company's asserted directives, so it could create a digital constellation of services that connected those directives to the corporation's ultimate goals. And with that basic understanding in place, Datavail is now as key a corporate component to the Company's future as is any of its individual business units.

Further, Datavail has also cemented the Company's data - current and emerging - as the foundation of its business processes. Using data gathered from across the organization and integrated into its many relevant databases, the Company can now make decisions based on actual corporate and market realities. By doing so, it will be able to reduce its costs, improve its efficiencies, streamline its productivity, and ultimately continue its triumphant march into the future. By taking on [Datavail](#) as a strategic business partner, this Company is now confident it made the best business decision possible.



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About Datavail

Datavail is a company of over 1,000 professionals helping clients build and manage applications and data via a world-class tech-enabled delivery platform and software solutions across all leading technologies.



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