



SUCCESS STORY DATA & ANALYTICS

# MODERNIZING INSURANCE BUSINESS OPERATIONS WITH DATA VISUALIZATION

Apexon delivers tailored reporting solutions to help insurance company gain full visibility into business operations and evaluate KPIs for future enhancements



As this national leader in life and health insurance, annuities and retirement-planning solutions experienced rapid growth, it was losing visibility into its business operations. Reporting systems were unable to meet the growing needs of the business, limiting visibility into performance, hampering decision making, and making collaboration between different functions and business units more difficult.

This insurance company was looking for a data visualization solution designed to scale alongside the company's rapid expansion.

The company engaged Apexon to work with its C-level executives and marketing leads to understand its reporting needs and deliver a custom solution that could meet its diverse needs and growth with it.



**Founded more than 50 years ago**



**National leader in life and health insurance, annuities and retirement-planning**



**Over 200,000 agents in 60 agency offices and over 35 independent partner offices**

## THE CUSTOMER JOURNEY

**2020**

- Data warehouse and business intelligence

**2021**

- Data warehouse and business project management

## THE RESULTS

# KEY OUTCOMES



**SIGNIFICANTLY IMPROVED  
VISIBILITY INTO COMPANY  
PERFORMANCE**



**SCALABLE DATA &  
ANALYTICS OPERATIONS**



**FULL VIEW INTO REVENUE,  
POLICIES, & MARKET  
PERFORMANCE**

## OUR METHODOLOGY

# THE DIGITAL LIFECYCLE

Apexon works with companies  
across the digital lifecycle.



## GO DIGITAL

**LAUNCH &  
EXPERIMENT**



## BE DIGITAL

**AUTOMATE &  
ACCELERATE**



## EVOLVE DIGITAL

**BE INTELLIGENT  
& AUTONOMOUS**

Enable digital adoption in  
a quick, and agile manner



Build digital infrastructure  
and foundation for  
enterprises to scale



Leverage data engineering to  
make strategic decisions and  
get digital right every time

Apexon developed SingleCare, a  
native App for Direct-to-Consumer  
pharmacy savings and is currently  
developing Admin and Member  
portals for their PMB platform

Apexon designed an implementation  
wizard with intuitive UI to streamline  
pharmacy benefit program set up

## THE CHALLENGE

# OPTIMIZING INFRASTRUCTURE FOR DATA VISUALIZATION & ANALYTICS

The company had made more than 25 mergers and acquisitions in two years. It had more than 200,000 agents in 60 agency offices and over 35 independent partner offices. The company's operations were spread across various branches and affiliates, making it difficult for executives to get a complete picture of the business.

Without a standardized system, executives had to tediously sort through data in numerous layouts, formats, and files to draw conclusions. This created several big business obstacles:



### Dispersed Data Processes

Disparate systems caused unorganized data and loosely defined data processes



### Decreased Productivity Across the Business

The need to manually sort and validate data created time inefficiencies for executives and slowed important decision-making



### More Difficult Collaboration

The lack of centralized reporting made it more difficult for different units and functions to coordinate and support one another's goals

## THE SOLUTION

# DATA VISUALIZATION & ENGINEERING

Apexon's reporting solution focused on two key capabilities for the company and its executives:

- Re-engineering the company's data to quickly and efficiently generate analytics and visualizations. This enabled executives to load dashboards with key metrics and interactive visualizations on demand
- Creating four state-of-the-art, industry-focused Tableau dashboards that track KPIs pertaining to revenue, production, effective headcount and marketer performance



### DATA VISUALIZATION

#### Dashboards

Full visibility of operations with up-to-date visualizations



### DATA ENGINEERING

#### Optimised for Analytics

Fast, reliable, and sophisticated reports

As a result, the company has much better access to critical information on the company's performance and is able to communicate it more effectively to keep different business units and functions in sync.

It also has more scalable data and analytics operations which provide a full view into revenue, policies, and market performance allowing executives and analysts to leverage KPIs to develop new strategies to support its growth.



Apexon is a pure-play digital engineering services firm focused on helping companies accelerate their digital initiatives from strategy and planning through execution. We leverage deep technical expertise, Agile methodologies and data-driven intelligence to modernize systems of engagement and simplify human/tech interaction.

We deliver custom solutions that meet customers' technology needs wherever they are in their digital lifecycle. Backed by Goldman Sachs and Everstone Capital, Apexon works with both large enterprises and emerging innovators — putting digital to work to enable new products and business models, engage with customers in new ways, and create sustainable competitive differentiation.

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