



Tableau Reports and Dashboards

What we have done

Client:
A leading Indonesian insurer

Improving **Operations** and streamlining **Business Processes**

Our client approached SYNERGY to help improve their operations and streamline their business processes. SYNERGY's consultants studied and benchmarked the client's processes and suggested multiple quick wins for improving their competency advantage. One of the areas was organizational reporting for empowering the senior management's decision-making process with prompt, reliable data on-time at their fingertip with minimal overhead. This was challenging because the users were dependent on paper trails and Excel files for capturing the operational data. Often, there were delays in generating the periodic monthly reports and ensuring single-source of truth seemed to be a nightmare. Coupled with this, there were multiple lines of business (LoBs) with various activities and processes being performed daily. Few of these activities involved data extractions from existing legacy systems and complex calculations. Data volume, variety and frequency posed a challenge in replacing the manual and laborious process of creating the reports and dashboards with a lead time of 10+ days. Converting operational data into insightful information for fine tuning the strategy seemed to be a far-fetched dream!

What we did well?

Robust **Data Analytics** and **Visualization**

SYNERGY's consultants helped map the daily processes from operational data to the respective business metrics. SYNERGY team realized that mapping various data points for driving insight at various levels of the organization was challenging to achieve in Excel and PowerPoint-driven reporting. Rather than automating the 'AS-IS' process, SYNERGY's consultants proposed an organizational level Management Information System with a robust data analytics and visualization approach encompassing New Business, Claims, PoS, Customer Care to name a few. Tableau, being a Gartner Magic Quadrant leader for 6 times in a row, was the de-facto choice.

SYNERGY developed a web-portal for the users to enter their operational data. This data was channelized through an ETL process for aiding Tableau reports and dashboards for various user groups. From the first month of its launch, customer found reliable data, promptly available with zero manual intervention. This helped them tremendously to drive their business strategy effectively and achieve agility and operational excellence.

Benefits



Faster time to market



Data Accuracy



Near Real-time processing



Auto-scheduled reports



Operational Savings



Zero manual intervention



An 'Eye' for Insights



Agile reporting
(Easy Maintainability,
Adapting to Change,
Large Volumes & Variety, etc.)

Synergy Strategic Solutions

SYNERGY STRATEGIC SOLUTIONS specialize in assisting insurance companies to navigate their digital journey with confidence and ease. Automating business processes, reducing costs, streamlining operations, improving customer experience and modernizing technology are some of the pressing needs of insurers that we address.

We have exclusively focused on the insurance industry since our inception in 2011. Our deep knowledge of the industry, its business processes and our ability to integrate legacy with digital technologies have made us the preferred partner for several Life, Health and P&C insurers across Asia. Headquartered in Hong Kong, we have operations across Singapore, Malaysia and India.