

Information Builders enables agile information solutions with business intelligence (BI) and integration technologies. WebFOCUS – the most widely utilized business intelligence platform – connects to any enterprise system or application and enables simple and intuitive interaction with information.

Brotherhood Mutual

Snapshot

Organization

Founded in 1917, Brotherhood Mutual Insurance Company is one of the nation's leading insurers of churches and related ministries.

The Challenge

Devise a cohesive enterprise reporting strategy without going through a lengthy data warehouse development effort.

The Strategy

Use WebFOCUS to overhaul Excel-based information systems and rigid hard copy reports, creating an organization-wide reporting foundation that is accessible to all types of workers.

The Results

Better workflow procedures for entering, retrieving, and managing information; a new set of GUI dashboards for displaying and analyzing data; a performance management framework for tracking productivity and adjusting workloads.

Information Builders Solution

WebFOCUS, Professional Services, Education.



Building a Reporting Community at Brotherhood Mutual

Insurance Company Weaves Web of Knowledge With WebFOCUS

Many organizations believe they need to build a data warehouse as the first step in an enterprise reporting initiative. But if they select a reporting environment with direct access to the database systems at hand, they may be able to skip that step and create reports directly from production systems. Such was the case for Brotherhood Mutual, an insurance company that works exclusively with churches and related ministries. Once Brotherhood Mutual heard the call for direct-access reporting, the Fort Wayne, Indiana-based company adopted Information Builders WebFOCUS business intelligence (BI) platform as its enterprise reporting standard.

"WebFOCUS is more versatile than most products on the market," says Rob Fosnaugh, senior programmer analyst at Brotherhood Mutual. "It's a user-friendly environment from both the user and developer's side, so pulling together information to fit each

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individual’s needs is a smooth and intuitive process. The architecture is so comprehensive that virtually anything is possible. Once the groundwork is laid in one area of the business, you can build on that foundation to support related reporting initiatives.”

As Fosnaugh explains, there are several advantages to the direct-access approach. Business users don’t have to wait for a data warehouse to be completed before they can start using the reporting tools. Instead of relying on dated information that is only periodically staged to the warehouse, they can access real-time data directly from operational systems. Even more importantly, from Fosnaugh’s viewpoint, direct-access reporting relieves the IT group from having to conduct massive database development projects.

An Enthusiastic User Congregation

Brotherhood Mutual runs its business on an IBM iSeries platform and depends on Lotus Notes for many of its workflow and Web applications. While this platform includes RPG-based reporting tools, IT Vice President Daryl Pannabecker wanted a general-purpose BI environment, so users could all go to one place to find the information they needed. Previously, users requested reports from the IT department or had to ask actuaries to create the reports for them.

“We needed a better way for users to access information as part of a cohesive database architecture that was maintained by the IT department,” explains Fosnaugh.

Fosnaugh envisions BI as a Web of knowledge that links the company together. “Once the basic reporting platform is in place, the business users should be able to define the boundaries of awareness and knowledge,” he explains.

After researching the major players in the data warehouse and BI market, Brotherhood Mutual selected WebFOCUS based on the flexibility of its development environment, strong support for business users, and highly responsive sales and support organization. “Information Builders seemed to be the right fit for our company, and they exceeded all of our expectations during the evaluation cycle,” he says. “Their attention to customers is unparalleled.”

An Enlightened Development Approach

Brotherhood Mutual hired Information Builders Professional Services to develop the fundamental aspects of the data access and reporting environment. “We were very happy with the services,” Fosnaugh continues. “Nothing was rushed and it always seemed like everything was under control.”

Fosnaugh quickly took the lead as the primary WebFOCUS developer. He found the learning curve to be quick and painless with WebFOCUS Report Painter. “This GUI-based development environment is great for creating reports, graphs, and basically any Web output,” he notes, adding that developers can use the underlying FOCUS language to create complex reports. “The language is fairly intuitive and it certainly extends the development capabilities of WebFOCUS,” he says. “It lets you go behind the GUI curtain to develop more advanced reports than is possible with other BI tools – stuff that would normally need to be done at the data mart or table level. There really isn’t anything you can’t do with this product.”

Fosnaugh attended several classes through Information Builders' Education Department to get up to speed with the BI software. "The classes kick-start the process and open your eyes to techniques that would probably take years to get to on your own," he says. Today, if he has questions, he commonly turns to Information Builders Focal Point technical forum, which he describes as "an online discussion forum where hundreds of fellow developers regularly respond to inquiries – often within 30 minutes of posting a query."

Reforming Internal Reporting Processes

Brotherhood Mutual's first WebFOCUS project involved overhauling an Excel-based time-tracking system used by customer service personnel. Previously, each rep spent four to five hours per month creating activity reports, and the IT department spent a solid week rolling up the spreadsheets at the end of each year. Using WebFOCUS and Lotus Notes, the team created a time tracking system that allows customer service reps to log their time as transactions take place. The new system streamlines all time-tracking activities and saves many hours for both reps and administrators. As an added bonus customer service managers have a new environment for analyzing the performance of their staffs, and information that previously wasn't available until the end of each period is now accessible in a few mouse clicks.

"We previously spent 40 hours at the end of each year reviewing the time-tracking data and combining spreadsheets," Fosnaugh calculates. "On top of that, each member of the team spent roughly 4.5 hours per month creating activity reports. That's no longer necessary."

After successfully completing the time-tracking system, Fosnaugh turned his attention to the claims department, where users gleaned most information from printed reports. Working closely with users, he prototyped a new application that lets these users display and analyze data through WebFOCUS dashboards. The claims department embraced the new reporting system almost immediately. "WebFOCUS has helped us to identify key performance metrics," says Scott Figgins, vice president of Claims for Brotherhood Mutual Insurance. "You can't monitor or change what you can't measure. The more aspects of our business that we monitor, the greater our accountability."

Claims managers now track pending claims through a WebFOCUS dashboard and generate workload statistics on demand instead of pouring over hard copy reports, which were formerly only available once per month. "It used to take us several months to notice when an adjuster was trending up, and we weren't always sure about the driving factors," Figgins continues. "We now see this information weekly and can drill down to determine what types of claims are responsible for the change. This allows our managers to adjust workloads more effectively."

Singing the Praises of WebFOCUS

Thanks to WebFOCUS, dozens of users can now access important BI information on demand through a browser interface. More than 25 drillable graphs boost awareness of every aspect of claims activity. Users can break down information by location, time, or individual adjuster, drilling down into each variable when they want to do further analysis. Key data is displayed visually. For example, managers have a color-coded dashboard interface that enables them to continually balance the workload for adjusters without having to study the underlying numbers. This balance

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Find Out More

To find out how our solutions can help your company succeed, talk to an Information Builders representative today. Contact your local Information Builders office, visit us at **informationbuilders.com**, or in the U.S. and Canada, call **(800) 969-4636**.

allows the adjuster to focus on each claim with the care and attention it deserves without being rushed due to work overload.

"WebFOCUS provides many new ways of accessing, analyzing and displaying our data," sums up Pannabecker. "It's an essential tool for management, planning, and operational efficiency."

Pannabecker plans to create an ad hoc reporting module to initially supply additional insight to about 25 managers and department heads. "WebFOCUS Managed Reporting will give managers a better understanding of what's going on in their departments by letting them do the 'what if' analyses right within their browsers," he predicts. As part of this new reporting architecture, WebFOCUS will automatically pull information into data marts as transactions occur, sorting information by year, month, and week to speed up the reporting process. Users will be able to save useful reports to a library.

Brotherhood Mutual is also interested in using iWay Software's DataMigrator to replace Microsoft Data Transformation Service, which it currently uses to move data from the iSeries platform to a Microsoft SQL Server database. Fosnaugh believes having the entire data access, transformation and BI process managed by Information Builders' products will result in more consistent data and metadata constructs. "We can use DataMigrator to pull data from iSeries, Lotus Notes, and our imaging server into a common staging area for reporting," he says.

In addition, Fosnaugh plans to design a management dashboard for corporate executives. It will contain drillable reports and graphs that reveal both summary and detail-level information.

"WebFOCUS fits our long-term vision perfectly," he concludes. "It enables us to get the most information and expertise out of our staff. It's very cohesive to have one tool set instead of a lot of different reporting domains."