



QlikView helps California Casualty improve sales conversion rates by 25% and compliance response time by 60%

New analysis and reporting capabilities deliver “one version of the truth” objective to drive more targeted marketing, higher lead conversions and enterprise efficiencies

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QlikTech customer California Casualty Management Company has improved lead conversions by up to 25% and reduced overhead for regulatory compliance reporting by 60% within the first three months of its deployment of QlikTech’s QlikView software. California Casualty is a leading provider of affinity insurance programs to educators, police- officers, firefighters and nurses in 43 states and the District of Columbia. The company uses QlikView to integrate and analyze more than 400 million rows—up to 1 terabyte—of data from disparate legacy systems for enterprise-class analytics. QlikTech and Team Business Solutions will be demonstrating its solution at booth #734 to others in the insurance and financial services industry at the 2010 IASA Annual Educational Conference and Business Show, June 6-9 in Grapevine, TX.

Following its early success with providing a dashboard for Corporate Management Reports, Actuarial, Sales & Marketing, compliance and IT applications, California Casualty is proceeding into its next phase of QlikView deployment with applications for claims management and deeper actuarial analysis. QlikView enables the company’s business decision makers to directly access and analyze a central set of data, in a simple manner that makes information more readily available to power users and end-users than traditional data warehouses, without the substantial time and expense required to implement and maintain.

“We were a legacy-based reporting systems shop,” said Satish Ranganathan, AVP, Applications Programming Manager, IT at California Casualty. “We were stuck in an environment of mainframe static reporting, information silos, multiple reporting tools, and constantly reconciling data because of all the different algorithms used in the various downstream systems. Our goal was to reorganize and streamline reporting and to embrace a ‘one version of the truth’ philosophy. QlikView enabled us to do this quickly and affordably.”

The most recent example of QlikView’s value at California Casualty was the integration of data from the company’s call recording system and an organically grown leads management system. The new QlikView solution provides an unprecedented ability to associate data and generate interactive applications for optimizing lead generation, leads follow up and track outbound sales results. Tracking KPIs such as number of leads called by agents, which leads are called, conversion rates, up-sell and cross-sell opportunities and trends allowed sales managers to increase average telesales per agent from 1.6 to 2.0 per day or approximately 200 sales per month, which translates to an improvement of more than 25%.

“QlikView dramatically changes how things can be done,” said Ranganathan. “It not only empowers our managers with visibility into processes and insights they can use to better coach their teams and tune workforce practices in ways that improve performance, but it also shortens the design and programming cycles.”

California Casualty serves customers who serve their communities across the country, leading to a constant flow of new or updated regulatory requirements and guidelines for compliance reporting to various state and industry oversight groups. Using QlikView, the company reduced the time to develop and update compliance applications by 60% with consistent and accurate algorithms, freeing more time for developers. Their IT department also uses QlikView to analyze their time tracking system and effectively produce reports for resource optimization among various project categories.

California Casualty engaged Team Business Solutions initially to develop a proof of concept exercise to determine if QlikView could handle federation of multiple data sources to produce accurate results. Once the results were validated, California Casualty partnered with Team Business Solutions on a multi-phase initiative to modernize their reporting systems paradigm.

The best part of implementation in California Casualty is the focus towards a Unified Enterprise Data Model/Repository, which shall be the Single-Source for all Dashboard, Analytic and Reporting needs across all departments.

During an evaluation process of the ETL and presentation aspects of the QlikView tool, Ranganathan used the free version to develop a few of their financial reports in just a matter of days. "I thought, either I'm a genius, or I got this wrong. It can't be this easy, but it was," recalled Ranganathan.

About California Casualty

California Casualty Management Company manages the operations of the California Casualty Group of insurers. The Group was founded in 1914 as the California Casualty Indemnity Exchange and today is a leading provider of auto and home insurance programs to educators, peace officers, firefighters and nurses.

About Team

Team is a leading QlikTech Partner with extensive experience in Insurance and other verticals in India and US. Team's expertise is particularly in Large Enterprise Deployments of QlikView, with very large data size deployments in India. With a CMM ready Agile Process for deploying QlikView, a large number of increasing consultants trained and certified, Team offers on-site, off-site and off-shore services for QlikView consulting, implementation and support. With over 100 successful customer implementations, Team focuses on Improving Business Performance and Business Effectiveness through QlikView.

About QlikTech

QlikTech's powerful, accessible business intelligence solution enables organizations to make better and faster decisions. Its QlikView product delivers enterprise-class analytics and search with the simplicity and ease of use of office productivity software. The in-memory associative search technology it pioneered makes calculations in real-time enabling business professionals to gain insight through intuitive data exploration. Unlike traditional business intelligence products, QlikView can deliver value in days or weeks rather than months, years, or not at all. It can be deployed on premise, in the cloud, or on a laptop or mobile device—from a single user to large global enterprises. QlikTech is headquartered in Radnor, Pennsylvania, with offices around the world and a network of over 1,100 partners to serve more than 13,000 customers in over 100 countries worldwide.