

Executive Insight for Insurance Performance Blueprint



Executive summary

This application brief demonstrates the IBM Cognos® Performance Blueprint built specifically for Executive Insight into insurance underwriting. Performance Blueprints are pre-defined data, process and policy models that help organizations speed their software deployments and drive faster return on investment. The *Executive Insight for Insurance Performance Blueprint* puts intuitive interfaces to multiple policy, claims and production data sources in front of key home office and regional executives, providing them with insight into critical performance areas that are pertinent to their individual decision-making roles. It provides insurance executives the insight they need about production, underwriting and claims, and presents this information in appealing and useful dashboards, scorecards and reports—on their computers and handheld devices.

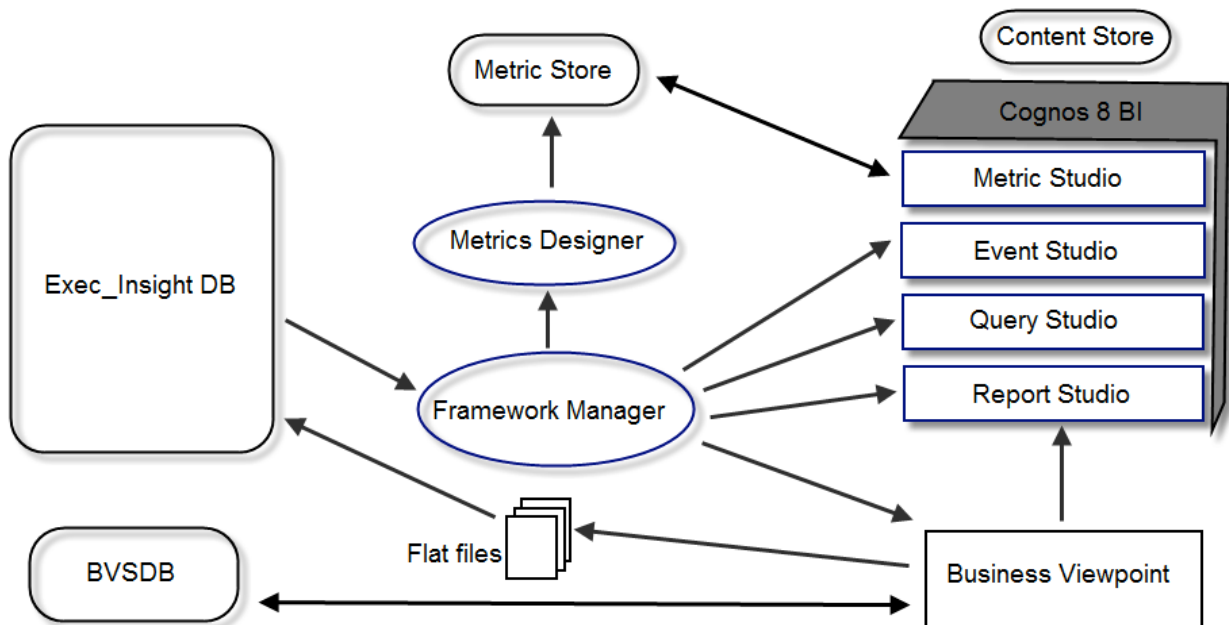
Blueprint objectives

The *Executive Insight for Insurance Blueprint* was created with the following objectives:

- Interactive reports and dashboards
- Event-based alerts to promote greater business agility
- Data-driven maps with drill-down capabilities
- Scorecards for tracking key metrics by region/job function
- Ad-hoc query and report generation
- Business-user management of organizational data hierarchies
- Integration with Microsoft® PowerPoint and Word.

Dataflow

The architecture in the following diagram shows the high-level dataflow of the blueprint.





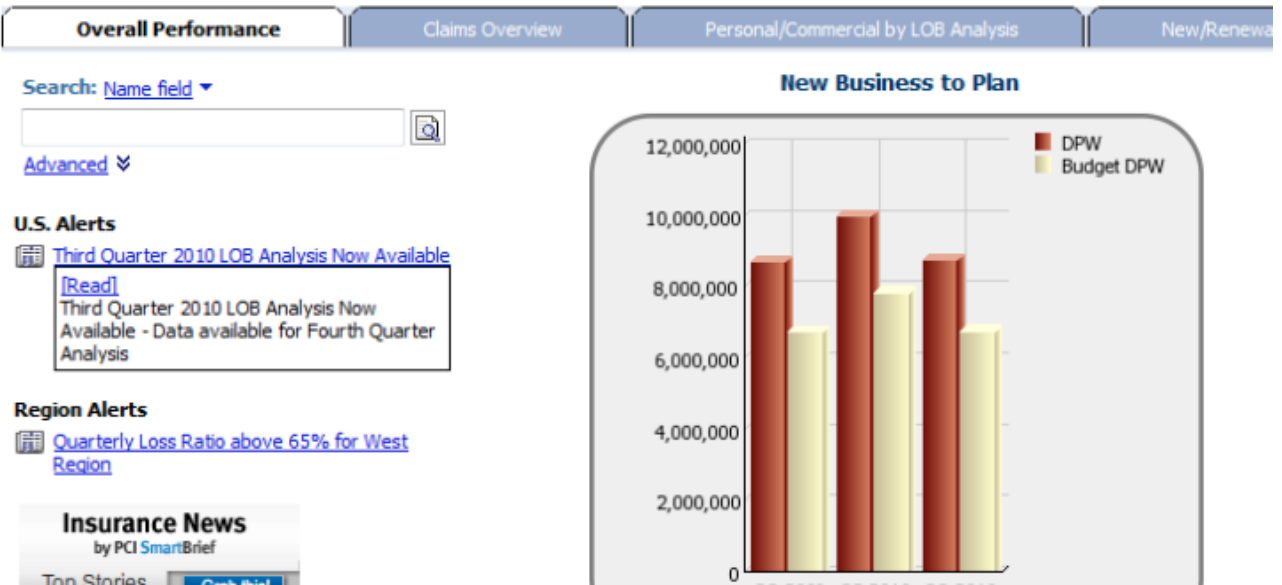
The “Exec_Insight DB” is a conceptual data mart that simulates the centralization of internal customer data. “Framework Manager” is the primary metadata source. Reporting, ad-hoc querying and event-based alerts interface directly with the Framework Manager package. “Metrics Designer” is a secondary metadata modeling tool that uses the Framework Manager package and funnels the data into a metric package stored in the “Metric Store” and is ultimately represented as a scorecard in Metric Studio. “Business Viewpoint” also communicates with the Framework Manager package so that business users can maintain the structures of certain hierarchical dimensions. Changes can be proposed, shared and committed back to the Exec_Insight DB. This is done by exporting the changed structure in Business Viewpoint to flat files and then using an ETL process to update the tables in Exec_Insight DB.

Top-level insurance executive dashboard

The Wealth Manager Dashboard provides insurance executives with an expedient answer to the most important question they have: how is my business performing? The dashboard uses graphs, maps, event-based alerts, and a scorecard summarizing the key metrics to help answer this question. In addition, executives can drill into deeper detail for more specific information by clicking hyperlinks or changing prompt values in the drop down boxes.

Finally, they are able to explore more detailed analyses of their business by clicking the different tab headers: **Claims Overview**, **Personal/Commercial by Line of Business**, **New/Renewal Business by Region**, **Direct Premiums vs. Plan/Loss** and **Prior vs. Current Period**.

Cognos Viewer - Insurance - Executive Insight



Event-based alerts

In the upper left of the Overall Performance tab are news items based on scheduled events created in Event Studio. When a specified condition is met in the event task, a message and link is populated in the alerts area so the executive is immediately aware of the important update.

Data-driven maps

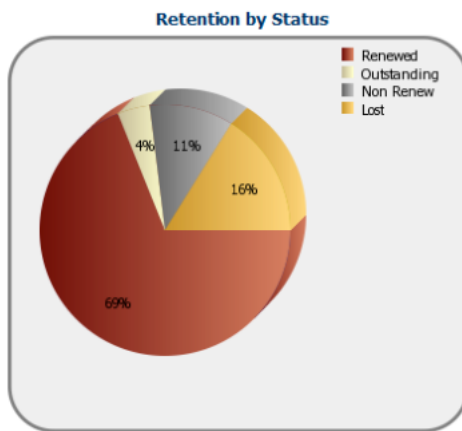
An executive can measure performance by region using a map chart. By clicking a region or state, he or she can drill-through to a more granular level of information regarding a special geography.

Q3 2009 Q2 2010 Q3 2010

2010 DPW(\$) Regions

DPW(\$) - Regions

Non-Renew	2,349	2,325	Sep 2010
Renewal Premium Quoted	99,724,580	98,727,334	Sep 2010
Renewals Taken	8,813	8,637	Sep 2010
Net Written Renewal Premium	79,381,972	84,938,710	Sep 2010
Terminations	3,729	3,431	Sep 2010

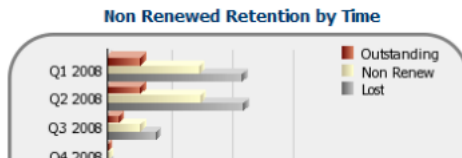


Top 10 States - DPW(\$)

Rank	State Name	Amount
1	New York	2,142,083
2	Illinois	1,547,077
3	Indiana	1,378,923
4	Utah	992,032
5	Maryland	990,759
6	Arizona	962,167
7	Massachusetts	872,073

Top 10 Regions - DPW(\$)

Rank	Territory	Amount
1	Northeast	7,961,050
2	Midwest	6,072,751
3	West	4,391,969
4	Southeast	4,298,590
5	Southwest	3,359,906
6	Northwest	2,245,043
Summary		28,329,308

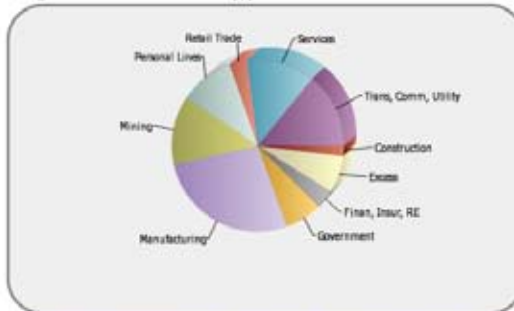


Northeast DPW(\$)-Regional Detail 2010

Northeast DPW(\$)-Distribution For FY 2010



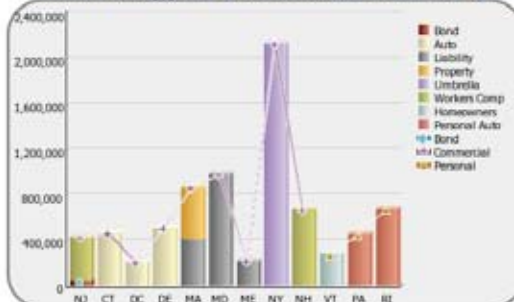
Strategic Business Unit DPW(\$)-Breakdown For Northeast FY 2010



Northeast DPW(\$)-Rank For FY 2010

Rank	State	Amount	%
1	New York	2,142,083	27%
2	Maryland	990,759	12%
3	Massachusetts	872,073	11%
4	Rhode Island	680,679	9%
5	New Hampshire	674,797	8%
6	Delaware	517,671	7%
7	Connecticut	469,748	6%
8	Pennsylvania	458,654	6%
9	New Jersey	434,133	5%
10	Vermont	285,023	4%
11	Maine	224,159	3%
12	District of Columbia	211,270	3%
Summary		7,961,050	

Northeast DPW(\$)-Line of Business Across State For 2010





Scorecard

The key metrics in the scorecard are divided into two strategic areas: **New Business** and **Renewal Retention**. An executive can hover over any metric in the dashboard for a quick glance at the historical trend.

For deeper analysis of the metrics, an executive also has the option of drilling into Metric Studio where he or she can examine such things as “impact diagrams.” These diagrams show the causal relationship between some of the key metrics.



Ad hoc querying

An insurance executive can also create ad hoc queries from the data model to look for anomalies that are not visible in the dashboard's pre-built content.

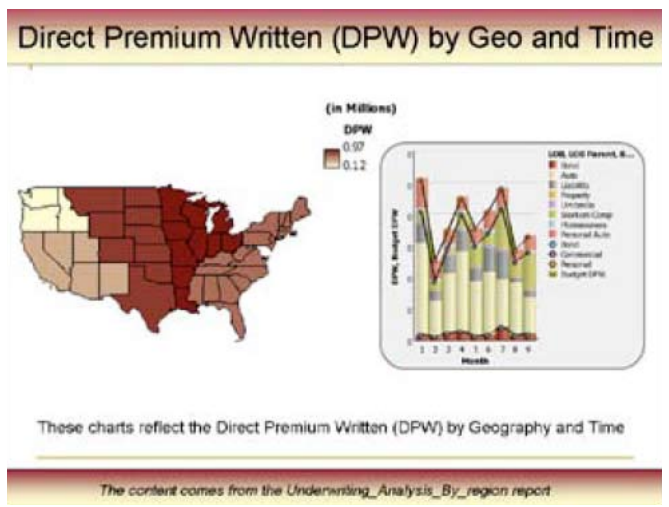
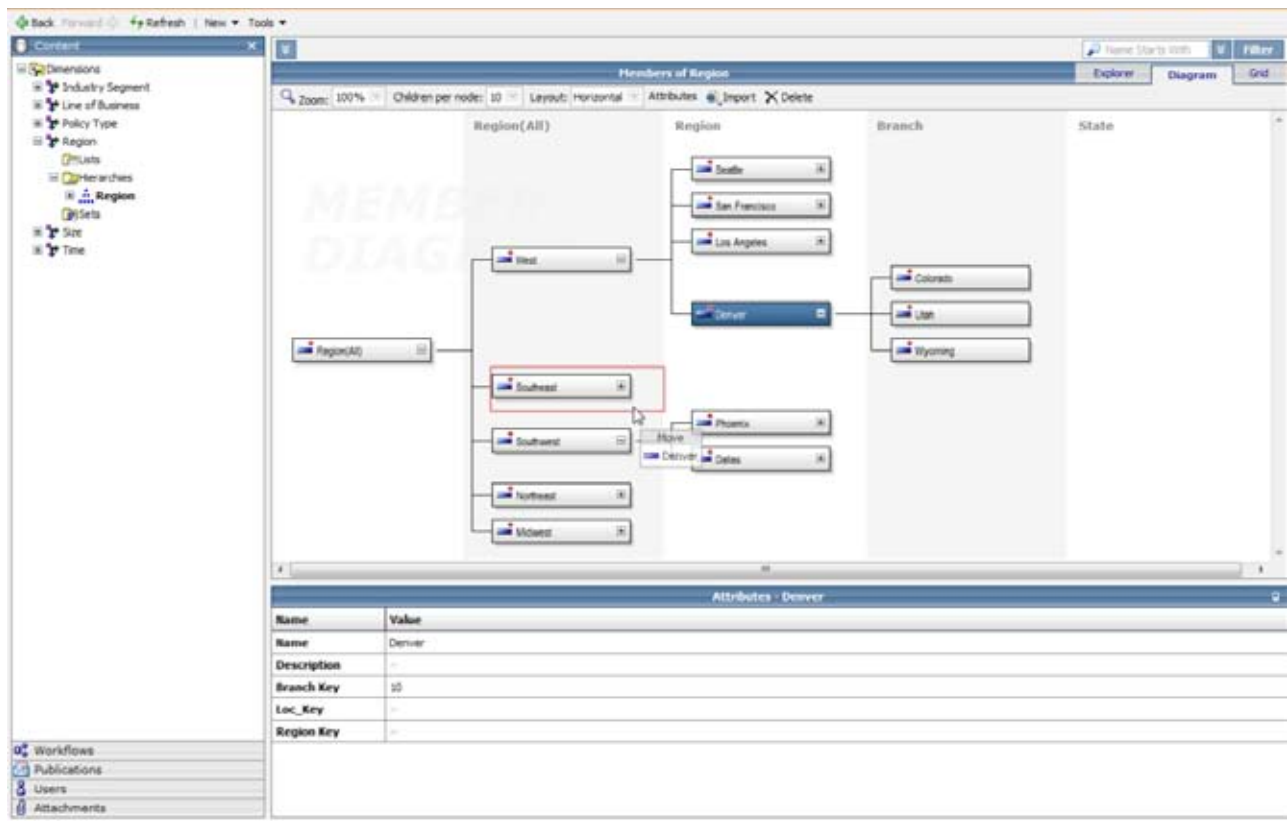
The screenshot displays the Query Studio interface. On the left is a navigation tree with categories like Executive Insight Model, Database View, Business View, Dimensional View, Org Hierarchy, Line of Business, Industry Segment, Location, Policy Type, Size, Time, Region, Region(All), Region, Branch, State, Metrics, Measures, Custom Calculations, Custom Filters, and Parameters. The main area shows a data table with the following content:

Region	Branch	DPW	Losses Paid
Midwest	Chicago	12,036,607	4,238,348
	Kansas City	7,226,526	2,849,703
	Minneapolis	13,059,500	4,854,567
Midwest		32,322,633	11,942,618
Northeast	Boston	7,326,559	4,314,871
	New York	3,442,758	3,750,996
	Philadelphia	4,880,714	3,859,116
Northeast		15,650,031	11,924,982
Southeast	DC	12,413,315	6,433,421
Southeast		12,413,315	6,433,421
Southwest	Dallas	3,358,800	2,855,386
	Phoenix	5,889,235	3,121,634
Southwest		9,248,035	5,977,019
West	Denver	4,457,496	2,432,700
	Los Angeles	3,772,160	1,961,192
	San Francisco	2,987,391	3,051,210
	Seattle	8,571,174	5,228,547
West		19,788,221	12,673,647
Summary		89,422,235	48,951,688

The interface also includes a menu (Insert Data, Edit Data, Change Layout, Run Report, Manage File), a toolbar with various icons, and a status bar at the bottom showing 'Information - Losses Paid' and the date 'Nov 17, 2009'.

Management of organizational data structures

Executives and business analysts can determine the need to reorganize structures from time to time. With Business Viewpoint, they can preview and communicate this process visually and transparently.



Integration with Microsoft Office

The IBM Cognos GO! Office plug-in affords an executive the ability to pull live report results from Microsoft Word document or PowerPoint presentation.



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