



Integrated sales cockpit at Visana increases productivity and transparency



Swiss insurance group Visana

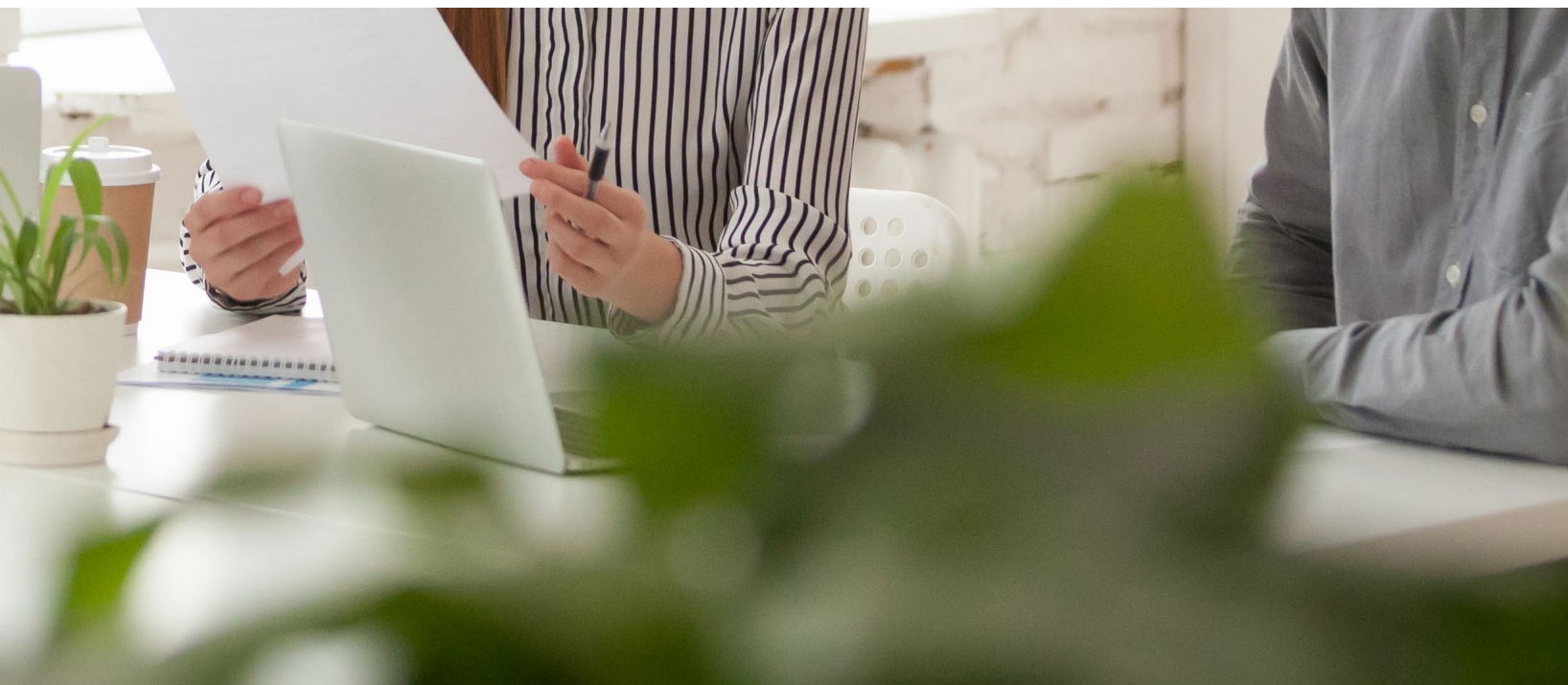
With more than 838,000 private customers and 16,000 corporate customers, the Visana Group, headquartered in Bern, is one of the largest health and accident insurers in Switzerland. In 2019, the group generated a premium volume of CHF 3.3 billion with 1,300 employees in around 100 locations.

Proximity to their customers and eye-to-eye human interaction are particularly important to the Visana. Visana offers compulsory health insurance as well as supplementary and property insurance in accordance with the Swiss Insurance Contract Act (VVG). In addition, corporate customers can insure themselves and their employees against loss of wages and accidents.



The challenge: Lack of transparency and granularity of key KPIs

Managers, managing directors, and sales employees were lacking a comprehensive cockpit that contains all important KPIs updated in a visually clearly structured manner. Here the concern was production and inventory figures, but also – and no less important – leads, contracts, and data from customer relationship management (CRM) and Adcubum Sirius. The cockpit should, according to Visana's dedicated requirement, offer a uniform, user-friendly view for all managers, but it should also be possible to adapt it for the information requirements of employees at all intermediate levels.



Solutions and results in detail

The business objective of the Visana Group was to increase the productivity of sales and the company as a whole. However, the old IBM Cognos analysis solution could not fulfill Visana's performance requirements to the satisfaction of all stakeholders. valantic's consultants therefore worked with Visana and decided to use the MicroStrategy analysis platform. The sales employees are very satisfied with the new solution.

- MicroStrategy's Enterprise Analytics Platform includes enterprise dashboards, mobility mgmt., analysis algorithms, reports, user authentication, and performance mgmt.
- Connection of BSI CRM and Adcubum Sirius
- Transparent, up-to-date, and easy-to-use dashboards for all sales executives
- Up-to-date dashboards for all sales employees, tailored to their activities
- User-friendly layout with all relevant KPIs
- Sales productivity increases
- 500 licensed users are currently working with the solution





„All the decision-makers worked together pragmatically and covered each other's backs. The sales employees are very satisfied with the new solution“

In mid-2019, the Visana Group and valantic started operations with the declared aim of taking productivity and transparency in sales and throughout the company to a new level. A user-friendly management cockpit seemed to be a suitable means of visualizing all relevant key performance indicators (KPIs) in a clear manner. In addition, it should be possible to adapt the new cockpit to the information requirements of all employees in sales at all intermediate levels. The new dashboards should provide all employees with the best possible support for their work.

In the spring of 2020, it became clear that the old IBM Cognos system could not optimally implement all requirements. In particular, performance factors based on the existing infrastructure called the success of the project into question.

valantic's consultants therefore recommended a re-evaluation. „**Under the Corona restrictions, this was a special challenge,**“ recalls Alfred Tschumi, group leader of the Business Analytics Team at Visana and technical project manager. In addition, new servers had to be set up and some of the infrastructure environment reconfigured. But „**all the decision-makers worked together pragmatically and covered each other's backs during this project,**“ continues Mr. Tschumi. MicroStrategy's Enterprise Analytics Platform was selected because it fulfilled all the requirements in the criteria catalog very well.

Powerful, transparent KPI cockpit for all stakeholders

In general, the focus was on production and inventory figures, leads, contracts, and integration into the existing CRM and ERP systems. „**Our requirement was a uniform customizable cockpit for all sales employees, including all management levels, a view that visualizes all relevant KPIs; one of our main objectives was transparency,**” explains Pascal Luginbühl, Head of Controlling at Visana Services AG. He continues: „**All relevant figures were already available, but not in the required granularity. Nor did the display and user-friendliness meet our requirements.**”

valantic and Visana linked all data sources, the BSI CRM, and the industry solution Adcubum Syrius to MicroStrategy's new analytics platform.

For Visana's key use cases, the cockpits, and self-services for employees, however, MicroStrategy's solution is more powerful given the framework conditions at Visana.





„The layout, display, performance, and user-friendliness are exactly what we want,” concludes Mr. Tschumi. **„The sales department is very satisfied with this, the feedback from the user side is very positive,”** says Mr. Tschumi, reflecting on the feedback from approximately 500 licensed users.

„valantic has made a great contribution. Due to the loss of some resources, our in-house expertise was not sufficient; valantic built the dashboard very professionally, integrated the data sources, and trained the employees, so that we put the system into production immediately after the project was finished,” said Mr. Luginbühl. MicroStrategy is a key puzzle piece for increasing productivity in sales and across the enterprise.

Depending on the functional area, the analysis tools MicroStrategy, IBM Cognos, and SAS will be used at the Visana insurance group in the future.

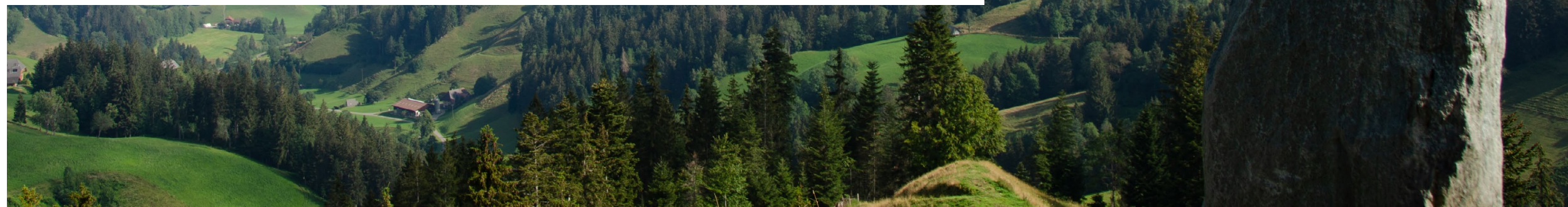


„The sales department is very happy with the new solution, and the feedback from users is very positive.“

Alfred Tschumi
Group Manager of Core Services at Visana

„Our main goals were greater transparency and higher productivity. valantic made a substantial contribution to this.“

Pascal Luginbühl
Head of Controlling at Visana



About valantic

valantic Business Analytics (valantic BA) is part of the valantic Group (www.valantic.com). We advise companies on the introduction and implementation of digitalization strategies, and we are proven specialists for solutions for corporate management (business analytics, connected planning, Big Data, data warehousing, predictive analytics). For more than two decades, we have been a successful, trusted partner to our customers (including companies in the pharmaceutical, retail, and producing industries, banks, and insurance companies).

valantic is a market leader in the digital transformation and one of the best digital solutions, consulting, and software companies in the world.

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