

# Case Study



**Pre-built Sales & Distribution Analytics delivered in 8 weeks**



**AIA Bhd. Malaysia**

# About Customer

Part of the AIA Group, the largest independent publicly listed pan-Asian life insurance group, AIA Bhd. has the financial strength, experience, service centre network as well as a well-trained team of 2,200 staff to serve its close to three million customers nationwide. As at end of 2013, AIA Bhd.'s total asset worth was RM42 billion, with a paid-up capital of RM767 million.

*The business management dashboard developed by GrayMatter is a powerful performance management tool empowering the user with business critical information for sales management and business planning across the distribution channel. The GrayMatter team's deep insurance domain knowledge coupled with business intelligence expertise and collaborative working approach with AIA team was keys to Go-Live in 8 weeks."*



**Teh Kim Leng**  
CTO, AIA Bhd. Malaysia

# Key Challenges



- Develop comprehensive “Performance management dashboard” for Sales & distribution channel with the relevant KPI’s & metrics
- Provide multi-layer drill-down capability from the dashboard for various analysis
- Integration of dashboard with the existing Sales Portal , ALPP with single sign-on
- Provide web access to over 17,000 business users across Malaysia on their smart phones & tablet through multiple browsers.
- Integration of Sales contest with the performance management dashboard

# Solution Proposed



The pre-built Sales & Distribution Analytics (IA+) developed on **Pentaho BI platform** was rolled-out to all distribution channel's across AIA Malaysia, providing performance dashboard access to AIA's over 17,000 strong sales force through smart phone & tablet. The project went live in a short span of 8 weeks

- GrayMatter deployed its pre-built Sales & distribution Analytic solution, IA+ with minimal customization to match AIA requirements completely
- Customized the dashboard for different users such as Life Planner, Unit Managers, district Managers, CAO and for the senior management.
- Integrated the dashboard with the existing AIA data bases for new business information
- Integrated the dashboard with the existing Sales portal ALPP and provided single sign-on through Active directory LDAP and role based security authentication.
- Integrated Sales Contest with the Performance Management dashboard.

# Customer Benefits

The deployment of the Insurance Analytics solution paved the way for the following benefits to AIA in their Sales & Distribution channels across the enterprise.

- Quick access to various business parameter through highly interactive dashboard interface
- Performance monitoring of over 17,000 sales force across the business units in Malaysia
- The Unit Managers & District Manager is able to review the performance of their team members on a daily basis with the help of performance management dashboard.
- The Chief Agency Officer (CAO) can easily track and guide performance of complete sales force including Life planners, Unit Managers & district Mangers
- Seamless integration with the existing AIA databases and existing sales portal enabling single sign-on authentication thus enabling easy access to business critical information.
- All the above functionality of Performance management dashboard has enabled the business manager in taking quick decision which will ensure dramatic improvement in top-line growth & new business acquisitions.

# Why GrayMatter?

GrayMatter is a BI, Analytics & Data Science specialist with over 100+ successful BI implementations across USA, EMEA & APAC spanning multiple industries. Collaboration with strategic technology partners like Pentaho, SAP, Oracle & Informatica besides in-house engineering excellence has given rise to innovative industry specific and horizontal product offerings. Solutions like Insurance Analytics IA+, Airport Analytics AA+, Finance Analytics FA+ Manufacturing Analytics MA+ have already taken big strides in the global markets.



and

“Being exposed to Insurance sales for over 10 years, I believe that the IA+ solution will significantly improve the productivity of Life Planners, Unit Managers and District manager of AIA Bhd. This will also bring significant visibility to the Chief Agency Officer (CAO) towards performance of branch managers and 17,000+ strong sales force on the field which can translate into dramatic top-line growth through new business acquisitions.”

**Naushad Khan,**  
*Head Insurance Analytics,*  
**GrayMatter Software Services Pvt. Ltd.**