

CASE STUDY

Enabling
Secure &
Scalable Data
Collaboration

Heffernan Insurance Brokers is one of the largest independent insurance brokerage firms in the United States.

They offer comprehensive business insurance, personal insurance, employee benefits, and financial services to a diverse range of businesses and individuals nationwide.



Because You're Different

online



THE CHALLENGE

Heffernan Insurance Brokers (Heffernan) has been acquiring other companies as part of their growth strategy. Each acquisition has brought unique technology systems and data, adding complexity to Heffernan's overall IT landscape. They required an effective solution to integrate these diverse sources into a streamlined process for storage, usage, disposal, and reporting, ensuring a standardized experience for all customers and enabling the creation of meaningful, aggregated reports that could be used for informed management decision-making.

Heffernan aimed to understand the system load to identify potential bottlenecks, plan capacity effectively to prevent data loss and delays, and gain financial insights into data volume. They needed to profile data types, formats, transformations, and aggregations to ensure consistency, accuracy, and effective data management across all systems.

Addressing data quality issues were crucial for ensuring data integrity, completeness, and reliability, optimizing the data flow process for better performance.

THE SOLUTION

To support Heffernan Insurance Brokers' enterprise objectives and accelerate growth, Online delivered a solution to provide Heffernan with a comprehensive understanding of data acquisition, storage, and usage volumes and activities across different systems.

Stage 1: Extraction and Consolidation

The Online team extracted and consolidated data from multiple servers to facilitate a comprehensive analysis of the data flow across Heffernan's systems.

Stage 2: Data Cleansing

The data was then cleansed and transformed to ensure data consistency and quality.

Stage 3: Data Analytics and Reporting

Utilizing SQL Server and Power BI, and by leveraging advance analytics, a set of interactive dashboards were developed around data volume assessment, data profiling and data quality. These dashboards unlocked critical real-time insights on the data flows across the systems visualized through unified reporting across the organization.

Supporting Activity – all Stages: Data Advisory Services

Our team also provide strategic direction in essential areas including data management strategy, governance and compliance, and advanced analytics.

Through this initiative, Heffernan is now able to more effectively integrate their diverse systems, adapt to market changes, and support innovation efforts.

Through customized reporting, several challenges were addressed:

- **The Data Volume Assessment Report** provided detailed insight of the volume, frequency, and types of data transfers and helped Heffernan to understand potential bottlenecks during data transfer, plan infrastructure capacity, and provide specific insights into the data volumes related to financial services.
- **The Data Profiling Report** showcased the structure, format, and quality of the data being transferred enabling Heffernan to understand their data characteristics, identify the various transformations and aggregations across systems, and understand unique transformations, which helps tailor solutions to their specific needs.
- **The Data Quality Report** detailed the quality of the data being transferred and helped Heffernan to ensure data integrity, improve data flow, and emphasize the quality of financial services.

Comprehensive data management doesn't just happen. Given the complexities introduced by Heffernan's acquisitions, understanding and integrating disparate data systems was imperative.

As a foundational step in the solution, Online's team conducted a thorough data profiling and analysis to map out the existing data landscape and pinpoint areas for improvement.



THE RESULTS

As a result of this initiative, Heffernan has achieved an increase in operational efficiency, cost reduction, and enhanced decision-making capabilities, contributing to Heffernan Insurance Brokers' competitiveness and sustainable growth in the insurance industry.

This project has also contributed to a cultural shift to recognize data as a strategic asset which is now fully supported through powerful Analytics Power BI dashboards.

RESULTS IN ACTION

- > Accelerated strategic acquisitions and integrations
- > Advanced analytics for enhanced customer understanding
- > Enhanced data Integrity and transaction monitoring
- > Seamless data system convergence for strategic decision making



NEXT STEPS

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