

IntelliVIEW empowers *over 150,000* geographically distributed employees at HDFCSL with critical, *on-demand, business information*

The Customer 

HDFC Standard Life Insurance is one of India's leading private life insurance companies, offering a range of individual and group insurance solutions. The company has covered over 9,59,000 lives year ending March 31, 2008. The HDFC group reported gross premium income of USD 1,457 Million for the year ending March 31, 2008.

Environment 

HDFCSL's revenues are driven by a team of 150,000 Financial Consultants (Agents) operating across the country managed by over 8,000 Sales Managers. Empowering Agents, Sales Managers and Senior Management with critical daily information in a way that is easy to access and use is key to HDFCSL's success. With the number of Agents expected to constantly increase, availability of real-time and relevant information became even more critical.

Extensive security clearance was required to access data in the Core Policy Management System that hosts the organization's data assets. This made it difficult for information to be shared with stakeholders across the organization to provide them with key information relevant to their day-to-day needs. To address this issue, HDFCSL deployed a solution for their key stakeholders, called "Consultant's Corner".

Users

Key Information Needs



Top Management

Monitoring key performance metrics with respect to Budgets, Sales Forecasts, Business Pipe, etc.



8000 Sales Managers

Monitoring Agent Performance, reviewing Lead & Prospect details, keeping track of Sales Targets, Achievement, Incentives, etc.



150,000 Agents

Dependent on the MIS system for a variety of business critical information, such as Lead Data, Customer Data, Policy Status, Premium Dues, Targets, Incentives, etc.

Key Challenges 

- Typical users had entry level computing skills, and needed a solution that would be easy to use and require minimum training
- Users needed the flexibility to modify & analyze data without depending on IT
- The ability of IT to support requests of such a large & distributed user base was limited

Highlights 

**HDFC Standard Life Insurance Company Ltd**

- Tier 1 Life Insurance Service Provider

**Environment**

- Over 150,000 Financial Consultants / Agents and 8,000 Sales Managers who are dependent on availability of critical daily information
- The number of Financial Consultants is expected to increase to 2.5 Million in 2 years

**Key Challenges**

- Users with entry level computing skills
- Simple and effective visualization of information
- Flexibility to modify, and analyze information according to individual and dynamic business needs

**IntelliVIEW Solutions Deployed**

- IntelliVIEW SDK, IntelliVIEW Designer and IntelliVIEW Report Analyzer

**Key Results**

- Annual savings of up to 30 million hours
- 10% increase in productivity for over 8000 Sales Managers
- Significant reduction in Administrative overheads through annual savings of production & distribution costs of close to 4 million sheets of paper

## Solution Deployed



- IntelliVIEW SDK
- IntelliVIEW Designer
- IntelliVIEW Report Analyzer (Web Client)

HDFCSL chose IntelliVIEW after a detailed assessment conducted by an independent CMMi Level 5 company that evaluated suitable Reporting and Business Intelligence solutions with a focus on the following areas:

- Ease of use for users who had entry level computing skills
- Interactivity and analysis capabilities
- Ease of deployment & management

With IntelliVIEW, the agents now have all the flexibility they need and the ability to access and interpret information as per their requirements. Even users with minimal computing skills are able to be fully operational in a day! It has also eased the deployment process by enabling end users to export data to CSV, Excel and PDF formats.

IntelliVIEW Designer (desktop tool for rapid design & publishing of interactive reports) enabled HDFCSL's report designers to connect to data sources, build interactive reports and publish them to IntelliVIEW SDK. IntelliVIEW SDK, provided HDFCSL the capability to integrate reporting and analysis into the "Consultant's Corner" web application and enabled effortless publishing of reports using real-time data. IntelliVIEW Report Analyzer (Web Client), enabled Agents and Managers to view, modify, extend or analyze their report data "on-demand" and without depending on the IT Team.

Today, with over 100 MIS reports, IntelliVIEW is the core solution that the 150,000 Agents, the 8000 Sales Mangers and the Top Management depend on for their information needs.

### About IntelliVIEW

**IntelliVIEW** is a next-generation reporting solution that offers interactive, easy-to-use reporting and analysis capabilities to users, while overcoming the key challenges associated with traditional reporting. IntelliVIEW improves user productivity and efficiency significantly while minimizing IT overhead, by providing users with the flexibility to modify, interpret, extend and analyze report information without training or dependency on the IT team!

## Key Results



### Productivity Improvement

- Annual savings of up to 30 million hours for 150,000 agents
- Significant improvement in productivity for over 8000 Sales Managers with up to 10% savings in manager-time

### Decrease in IT Overhead

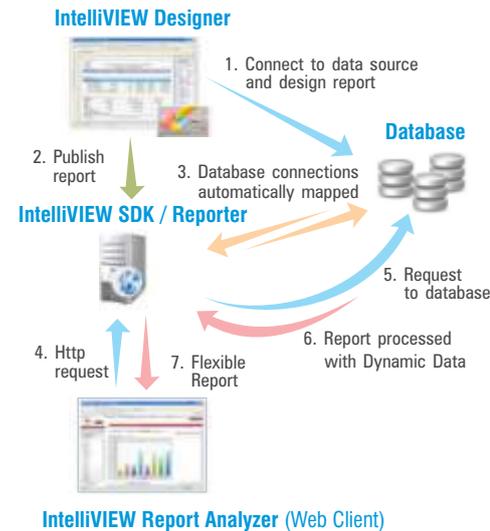
- Deployment effort minimized due to self deployment capability of IntelliVIEW Report Analyzer (Web Client) for over 80,000 agents and 8,000 managers with minimal training effort
- Ongoing IT overhead minimized due to self serve reporting & on-demand analysis capabilities for users

### Decrease in Admin overhead & expenses

- Administrative overhead on branch operations significantly reduced due to real time availability of Client & Policy info for agents
- Significant reduction in overheads through annual savings of production & distribution costs of about 4 million sheets of paper

### Competitive Advantage

- HDFCSL Agents gained a significant competitive advantage in the market by improving service levels and minimizing turnaround times for customer requests



## Awards

- The "Consultant's Corner" implementation won the 2008 PC Quest Best IT Implementation Award

## Synaptris Highlights

- Headquartered in San Jose, CA with a global footprint
- Over 2,250 customers across 80 countries and multiple verticals
- Over 90 Partners across North America, Europe, Africa, Middle East & Asia Pacific
- Over one hundred Fortune 1000 customers