Empowering an International Insurer for Self-Service BI

Our client is a global property and casualty insurer, with a substantial specialty business. They offer a wide range of insurance products and services and operate in over 25 countries across the globe.

The Vision

The company recently invested in a technology platform with strong self-service capabilities. They envisioned a culture where business users would be able to leverage that platform to independently access and analyze information empowering them to make timely, data-supported decisions.

The company believed this type of self-service approach would give greater accountability and capability to business users, and that the reporting required to aid decision making could be created in an efficient and effective manner. The company recognized that a comprehensive empowerment program would be required to train and support users to enable them to become truly self-sufficient.

The self-service platform was to be used by many different business functions, including Finance, Claims, and Underwriting, therefore the program needed to be both custom enough to suit these business functions' needs and flexible enough to be adapted for other areas of the business.

For the company, it was important that the program foster an environment conducive to continued learning and that it be shaped to become self-sustaining. The program needed to serve users across the globe and create a unified culture and community around responsible and efficient self-service capabilities.

Delivering the Vision

Thorogood worked with the company to explore how they might develop the role of a power user and advanced power user within the organization and shape a program that caters to their specific needs. To fully achieve the vision, the solution incorporates facets of change management that extend the system beyond just technical training.

The program gives all users foundational technical training, to cover the company's current technology landscape, majoring on a variety of tools and best practice areas. The program also emphasizes the wider aspects of empowerment, including continued learning, developing and sharing of best practices, and establishing a supportive internal community.

A key part of the program is to ensure that a user's transition from foundational training to real world application be smooth and supported. To this end, the program includes training materials custom built for the company based on data sources that are real and relevant to the user.

The user is thoroughly supported beyond the technical training. Thorogood's solution offers personal coaching, where a user can call directly upon an expert to help them as they delve into real world applications of the tools. In addition to this live support, materials are shared through a SharePoint-based on-demand knowledge base, providing users with a one-stop-shop for training materials, tips and tricks, and other relevant information.

The program has been devised so that it can be piloted in one department and then rolled out to the other departments with small adaptations. The pilot program is for 150-200 users, 25 power users, and a small number of advanced power users who will be trained to facilitate the foundational sessions so they may themselves train future classes.

Next Steps

As the pilot group completes the training program, Thorogood will help the company adapt the materials to the other business functions and roll it out gradually across the organization. Because a large part of the program is around community and continued learning, Thorogood will continue to help the company build and sustain an environment that encourages and supports its self-service users.

Find out more:
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