

Client Engagement Summary

Life insurance company



DETAILS

INDUSTRY

Insurance

COMPANY SIZE

200 Employees

TAGS

Strategy
Power BI

CLIENT BACKGROUND:

From life insurance to retirement planning, education savings and more, this company has been helping individuals protect their financial lives for 150 years. With assets of \$1.64 billion and more than 143,000 members across the United States, their strength comes from being a different kind of financial community.

CLIENT BUSINESS CHALLENGE:

The client was looking for ways to grow additional leads within their business and better focus their targeting of potential members. They were new to leveraging their own data, and vendors were pushing large data warehouse solutions without understanding their core business priorities.

STRATEGY AND SOLUTION:

Baker Tilly Digital conducted a business intelligence strategy assessment to identify the overall maturity of the organization, technical strength and key business drivers.

This assessment included:

- Interviewing many key stakeholders within the organization
- Developing a complete picture of their analytical needs and potential benefits

Baker Tilly Digital's assessment approach is unique because:

- We leverage interview details and proprietary processes to distill information into actionable road maps.
- Understanding the client's business goals allowed us to recommend a smaller step that could provide significant gains.

After our initial assessment, Baker Tilly Digital was able to propose a solution that cost less than other vendor proposals, building the foundation for future growth and what drives the business today.

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