

# Informatica Solutions Plays a Vital Role in the Construction of Generali China Life Insurance's Business Intelligence (BI) Platform



"Informatica solutions have helped us to achieve unified data management and analysis, as well as improved the efficiency and accuracy of data processing with its powerful cross-platform data extraction, processing and analysis capabilities. From national unity of data platforms to national centralization of analysis teams, we've greatly reduced our operating costs. The system's encryption function ensures data security."

**Tian Bi**, General Manager, Information Technology, Generali China Life Insurance Co., Ltd.

## Generali China Life Insurance Co., Ltd.

Founded in 2002, Generali China Life Insurance Co., Ltd. (hereinafter referred to as "Generali China Life Insurance") is a joint venture company established by Italian Generali Insurance Company Limited and China National Petroleum Corporation. The company currently has 10 provincial-level branch companies and more than 70 branches. After years of steady development, Generali China Life Insurance has a registered capital of CNY 3.7 billion and total assets of nearly CNY 50 billion, becoming the largest Chinese joint venture life insurance company. The company's strategic position as a leader in the financial and energy industry, its overall asset size and top 50 ranking among the Fortune Global 500 are just a few of Generali China Life Insurance's achievements. The company's management efficiency, levels of innovation, technology and service, and other intrinsic values are powerful guarantees of continued performance.

Science and technology are core to Generali China Life Insurance's corporate culture. The company improves its market competitiveness and achieves sustainable development through information

technology. For the company's internal operations, it increases efficiency, reduces costs, controls risks and improves decision-making through innovative technologies. For clients and through its sales personnel, Generali China Life Insurance provides first-class customer service via both science and technology.

## Establishing a business intelligence platform

The information technology department at Generali China Life Insurance relies on a scientific and technological approach to innovation and development. The company pursues the most advanced science and technology trends to achieve its goals and has done so with positive results. For example, Generali China Life Insurance has successfully built various business systems and platforms which include a personal insurance core business system, personal insurance claims system, group insurance system, call center system, financial and official document system, HR system as well as business processing platform and an online self-service platform.

During the company's growth and development, the number of branches has increased annually, business systems



**中意人寿**  
GENERALI CHINA

### Challenges:

- Alleviate pressure on business system from unified data platforms, and slow statements and reports generation.
- Reduce sharp increase in labor costs from unified statements and reports platforms as well as duplicate developments.
- Eliminate or reduce reports of various standards generated from unified data indicator definitions and branch operations.
- Provide fast and timely decision-making support for the company's business expansion.

### Benefits

- Achieved data integration, unified statements and report platform as well as centralized management of statements, reports and business data analysis.
- Reduced reliance on labors and labor skills as well as labor costs and business risks, and improved work efficiency.
- Increased ability to evaluate, analyze and guide business development, decision-making support and precise marketing, and improved production capacity and benefits.

### Inside the Solution

- Informatica PowerCenter

have become increasingly complex, business scale has become larger, and the speed at which business and historical data is growing has doubled. What is the best way to efficiently and accurately analyze and use such valuable data in different systems to help the company's decision-making and further produce business value? It is an important issue that Generali China Life Insurance's top management faces. Tian Bi, General Manager, Information Technology (IT), Generali China Life Insurance, believes that it's necessary to gradually improve support for a comprehensive operating system, immediately start the construction of a unified business intelligence (BI) platform, and provide techniques and methods to help the company quickly analyze data, and then transform that data into useful information and knowledge to drive business development.

The purpose of the BI project implemented by Generali China Life Insurance is to reduce labor costs and improve work efficiency. Following are three causes of high labor costs: disunified data platforms, disunified indicator definitions and disunified statements and reports platforms.

According to Nie Huijing, Director of Business Intelligence Center, Information Technology, Generali China Life Insurance, "First, as the company doesn't have unified data platforms, all data extraction, statements and reports need to be directly extracted from the business system database. With the increasing amount of data, it takes two or three hours or even longer to generate complicated statements and reports, and data extraction logic will directly affect operations of the business system, causing high pressure to the system. Second, as the company's headquarters doesn't build a unified BI platform, statements and reports of various branches are processed by hand at their own discretion, resulting in higher labor costs, duplicate developments and overlapping contents of statements and reports. Third, too much reliance on specialized personnel proposes very high requirements in terms of skills. Fourth, as there is no unified indicator definitions,

data reports and statements made by branches have no unified standards."

## Informatica ETL Tools play an important role

Generali China Life Insurance's BI project is a huge. Since the project's approval at the end of 2008, Generali China Life Insurance spent a whole year on demand investigation and research, model design, data integration (DI) implementation, statements and reports customization, testing and on-line deployment. At the beginning, Generali China Life Insurance's IT department carried out the investigation, research, design and implementation based on a detailed analysis of the company's actual demands, recognizing that implementation of a BI application not only needs to grasp skilled data analysis and mining technology, but also needs to understand the company's own insurance business model. Generali China Life Insurance decided to abandon outsourcing and rely on independent development.

The first step of a successful BI project is to carry out data integration and build a unified data platform. Only in this way, can data sources of business systems, statements and reports be independently separated. Thus, preparations of statements and reports will not affect the business systems performance and will reduce the difficulty for report makers to learn the data structures of different systems.

When selecting data integration solutions, Generali China Life Insurance conducted comprehensive comparisons and testing of data integration products of many well-known manufacturers. The company evaluated the support for the platform, for data sources, data transformation function, management and scheduling functions, integration, openness, management on metadata and other aspects. Informatica PowerCenter allows users to quickly and easily access, integrate and transmit many types of data, and have an outstanding performance in ease of use, processing efficiency, platform scalability and stability, etc. Therefore, Generali China Life Insurance's IT department finally determined

that Informatica would carry out the company's need for data integration: data extraction, data checking, error handling, data conversion and loading.

The BI platform uses advanced data warehouse technology. It integrates business data, actuarial data, financial data and customer service data from different sources through Informatica PowerCenter. According to the characteristics, needs and organizational analysis theme of the life insurance industry, Informatica PowerCenter implements data cleaning, filtering and reorganization so that data is saved and organized at a reasonable relationship and unified definition to constitute the life insurance business data warehouse ODS (operational data store). Based on the Oracle data warehouse, the platform provides convenient and fast on-line analysis and processing systems and intelligent multi-dimensional statements and reports generation and posting systems, as well as decision-making support systems grasping and controlling macro-control information for senior management through a friendly BI front-end display tool from MicroStrategy® Incorporated.

## Data integration solution deepens project objectives

The objectives that Generali China Life Insurance wants to achieve through BI are data integration, carry out centralized management of statements, reports and business data analysis and reduce reliance on excess labor and skills. Such objectives mainly focus on saving of labor costs. As a core data integration engine, Informatica PowerCenter provides extensive cross-platform coverage capability. Generali China Life Insurance's core system environment includes a variety of database types, from DB2 and SQL Server to Oracle and text files, as well as various versions ranging in age from more than ten years ago to the most current. Informatica PowerCenter is capable of sorting and integrating data between various systems. It achieves a cross-system data collection and reduces the complexity of data extraction. The

product also supports data sources in various formats. It is applicable to processing and management of financial structured and unstructured data, such as customer information, customer orders and documentary evidence, contract documents, video images, and more. Moreover, it organically integrates those data from different sources and with different formats, solving Generali China Life Insurance's biggest environmental diversity problem in a perfect manner.

By providing data integration services, Informatica PowerCenter significantly reduces the data supply pressure of various business systems, and achieves a unified centralized data management environment for the entire company. Now, it is not necessary to directly extract all kinds of data and statements and reports from the business system database, greatly reducing the time spent on generating complicated statements and reports from the enterprise data warehouse ODS. Meanwhile, unified data platforms will not need statement and report makers to learn data structures of various business systems. This reduces the requirements for specialized labor, thus saving on labor costs. Informatica solutions achieve unified management and analysis of data, and improve the efficiency and accuracy of data processing. Now, it takes only a few seconds to complete the processing of complicated program logic.

Before implementing BI, there were more than 20 people who prepared statements and reports in the business administration section of Generali China Life Insurance's branches. In addition, 30 people plus other personnel produced statements and reports from the company's headquarters. Now, branch companies don't need to have specialized personnel

to prepare statements and reports. Only 10 people are retained to carry out such work in Guangzhou and Beijing. Analysts can devote more time and effort to researching data instead of integrating data. As a result, human resources are freed up from this kind of work. From national unity of the data platforms to national centralization of statements and reports preparation and analysis teams, the company has greatly reduced its operating costs.

Intelligent data parallel processing capability from Informatica PowerCenter is one of the characteristics Huijing most appreciates. Huijing commented, "It provides users with custom partitioning function and accelerates field validation, transformation, sorting and dimensionally aggregated speed, and the high-performance data throughput capability allows Generali China Life Insurance to process large amounts of data in a very short period of time." Data processing efficiency is significantly improved, meeting Generali China Life Insurance's business development needs. In addition, Informatica PowerCenter is a full graphical development model, without the need for coding. The product interface is user-friendly and intuitive, which is convenient for users to debug and use.

## Creating values beyond expectation

For an enterprise, IT is a process that constantly breaks through existing ideas. Bi believes that success of the BI project is "not just to build, but to use." During the "use" process, Bi says that we can learn from the changing needs of users, and then make timely adjustments to improve the entire project. After three years of usage, Generali China Life Insurance's

BI platform has fully achieved the company's objectives. It has reduced the enterprise's labor costs and business risks, improved work efficiency, and is now called "a platform specialized for actual production." Bi also hopes that the platform can deliver greater value in decision-making, guidance services and labor analysis, and achieve precise marketing as well as improve production capacity through in-depth digging of data, network marketing data collection and correlation analysis. The company is pleasantly surprised that those objectives are being gradually realized beyond expectations. For example, morning and evening reports management, performance statements and reports, labor statements and reports, insurance tracking, KPI (key performance indicator) management and other content analysis, provide the company with sales perspective, risk discovery, timely decisions adjustment, and lay a foundation for in-depth data mining in the future.

Generali China Life Insurance's BI platform has become a unified platform of bulk data exchange and integration for entire company's systems and a conduit between headquarters and branches. As business development continues and data amounts increase, the platform also needs to have adaptability and scalability for future needs. Only in this way, can the platform adapt to strategic needs of the enterprise at different stages. Informatica PowerCenter can expand to support large data capacity, as well as adjust and modify data integration strategies and process tasks according to data sources. This, in turn, will meet Generali China Life Insurance's growing data needs, save costs and reduce risks associated with data downtime.



Digital transformation is changing our world. As the leader in enterprise cloud data management, we're prepared to help you intelligently lead the way. To provide you with the foresight to become more agile, realize new growth opportunities or even invent new things. We invite you to explore all that Informatica has to offer—and unleash the power of data to drive your next intelligent disruption. Not just once, but again and again.

Worldwide Headquarters, 2100 Seaport Blvd, Redwood City, CA 94063, USA Phone: 650.385.5000 Fax: 650.385.5500 Toll-free in the US: 1.800.653.3871  
informatica.com | linkedin.com/company/informatica | twitter.com/Informatica

© Copyright Informatica LLC 2018. Informatica, the Informatica logo, and PowerCenter are trademarks or registered trademarks of Informatica LLC in the United States and many jurisdictions throughout the world. A current list of Informatica trademarks is available on the web at <https://www.informatica.com/trademarks.html>. Other company and product names may be trade names or trademarks of their respective owners. The information in this documentation is subject to change without notice and provided "AS IS" without warranty of any kind, express or implied.