

# Linking People, Strategy, and Performance



## client

Progressive Casualty Insurance  
Mayfield, OH USA  
25,000 employees  
450 offices

## solution

Business Objects to OBIEE Migration  
Simultaneous BI & ERP Deployment  
Workforce Analytics  
Compensation Analytics  
Custom-built Survey and Training Analytics  
Custom Training Program  
500+ users

## technology

Oracle BI Applications  
Oracle BI Enterprise Edition  
Oracle HR Analytics  
PeopleSoft  
Oracle Database 11g  
SAP Business Objects  
Microsoft SQL Server  
Red Hat Linux OS

## Workforce, Compensation, and Survey Analytics at Progressive Casualty Insurance Company

### About Progressive

Progressive offers insurance for personal and commercial autos and trucks, motorcycles, boats, recreational vehicles and homes. It's the fourth largest auto insurer in the country, the largest seller of motorcycle insurance and a leader in commercial auto insurance.

### Business Drivers

Progressive needed a human resources analysis solution to help answer the following questions:

1. How to keep employee turnovers low?
2. How to identify the groups of people who are at risk of leaving?
3. How do employees feel about the Progressive as their employer?
4. How can Progressive get proper visibility into the head count and demographics of their employees?
5. How can Progressive better understand promotions/transfers/new hire events at Progressive?
6. What can Progressive do to have a more structured approach of employee development through a centralized training system?

The desire was to create an application that could help address the questions above and would facilitate 24 x 7 user access.

### Solution

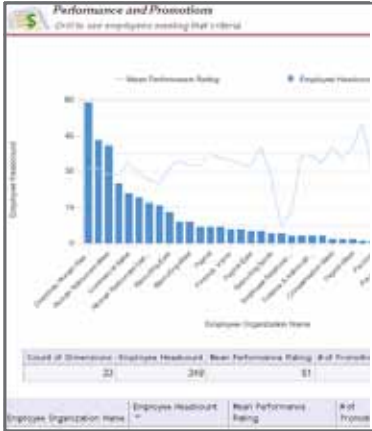
This project was a large effort that focused the implementation of Oracle BI Applications-HR Analytics against PeopleSoft ERP, some custom analytics, and the consolidation of existing data warehouses. The solution consisted of four primary areas to meet the business needs of Progressive.

1. Migration of SAP Business Objects to Oracle BI (OBIEE)
2. HR Analytics & Human Resource Management System (HRMS) Scorecard
3. Custom Survey
4. Training Analytics

### Challenges

Beyond the technical complexities involved in converting from one business intelligence tool to another, the biggest challenge was ensuring user adoption of the new tools among a group of users that are not considered to be technically savvy.





### Migration of SAP Business Objects to Oracle BI (OBIEE)

Using KPI’s proven proprietary methodology for Business Objects to Oracle BI migration, Progressive was able to move the existing HR reports into a new, more robust environment. This process also included the migration of Microsoft SQL Server to an Oracle database platform. KPI’s migration process from Business Objects to Oracle Business Intelligence has four distinct phases:

1. Audit Phase
2. Analyze Phase
3. Development Phase
4. User Acceptance Phase

#### Audit

The Audit Phase is one of the most important in any report conversion process. The Audit Phase determined the initial scope of the project. The final deliverable of the Audit Phase was a comprehensive list of all reports identified for conversion.

#### Analyze

After the list of reports identified for conversion was prepared in the Audit Phase, business intelligence experts determined the best way to migrate each existing report within the functional capabilities of each application. A high-level design for report conversion was constructed.

#### Development

The Development Phase was the phase during which Progressive was able to greatly minimize costs and maximize the benefits of the conversion process. Reports were converted using a proven proprietary strategy. All reports were unit tested. Staging and production environments were prepared.

#### User Acceptance

The User Acceptance Phase focused on Progressive’s end user. Users were trained to understand the features of Oracle BI and how these features map to features within Business Objects. All critical issues were resolved and the solution was deployed into the production environment.

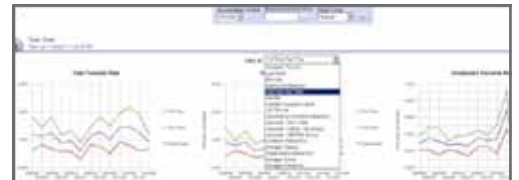
#### Custom Survey & Training Analytics

Oracle’s BI Applications were extended to include additional support for Survey Analytics and Training Analytics at Progressive. The custom-developed Survey Analytics area of the solution provides Progressive HR management measurements and metrics around employment satisfaction. The custom-developed Training Analytics area of the solution provides insight into their employee development program

#### HR Analytics & Human Resource Management System (HRMS) Scorecard

Beyond converting existing HR reports from the previous BI tool, Progressive sought to augment their analytical capabilities through the construction of an HRMS Scorecard that provided key metrics in the following areas:

- Employee head count & turnover
- At-risk employees
- Employee demographics & diversity
- Performance & Promotions
- Transfers & New hires



Oracle's HR Analytics was deployed with a new data warehouse and extended to meet the additional needs of the HRMS Scorecard.

Progressive successfully uses Oracle HR Analytics to analyze turnover (both voluntary and involuntary; controllable and uncontrollable) from 25+ different angles in graphically intuitive ways.

- Gender
- Ethnicity
- Age band
- Performance band
- Termination reason
- Business organization
- Manager
- Job tenure

This gave Progressive new insights into their turnover data and helped them proactively identify at-risk groups of employees who are likely to leave the company and allowed them to tweak their retention strategies.

#### **Duration**

The effort was initiated with a KPI Partners Vision Workshop that brought together all the key stakeholders within Progressive's Technology Department, Progressive's business sponsors, functional & subject matter experts, and the business intelligence project team. After a 5-month project, old Business Objects reporting was converted into the new OBIEE environment, Oracle BI Applications-HR Analytics was deployed featuring a new Human Resource Management (HRMS) Scorecard and extended functionality for Survey & Training Analytics, and additional data warehousing elements were launched.

#### **Success Criteria**

Progressive required a single consolidated view of their human resources organization. A successful implementation would facilitate the ability to refresh business intelligence data daily and accommodate 24 x 7 user access.

High-level performance and data accuracy were critical success criteria. End user acceptance and adoption was a major success criterion for the effort.

#### **Total Cost of Ownership (TCO) & Return-on-Investment (ROI)**

By selecting the tightly integrated solution from Oracle, Progressive is now able to better monitor corporate performance. Progressive can more efficiently deliver critical business information throughout the value chain and obtain an overall lower total cost of ownership.

- Cost savings with the standardization of a single BI tool.
- Time & cost savings with avoiding multiple disparate tools in use, including countless spreadsheets
- Improved quality and speed of current processes to create management reporting
- Time savings in developing reports and validating data
- Reduced support & maintenance costs
- Time savings in managing report security
- Time & cost savings of system convergence/ integration with ERP & middleware
- Improved organizational effectiveness

#### **Adoption**

User adoption within Progressive's Human Resource area has been very high. The system currently supports over 500 users who are experiencing response times ranging from 0-30 seconds.

### **Consolidation of Systems**

Multiple systems were consolidated. Disparate Business Objects and SQL Server environments were consolidated into a single Oracle Business Intelligence environment. Oracle Business Intelligence is now the enterprise-reporting standard for human resources at Progressive.

There has also been a significant reduction in the use of other outside tools, such as Excel, for routine reporting which has led to a higher rate of employee productivity.

### **Why Was Oracle Chosen?**

Progressive went through an extensive evaluation process to determine if there would be enough tangible value in moving from Business Objects to Oracle Business Intelligence. After deliberation, Progressive moved to make the change based on the following value-driven criteria:

- A lower total cost of ownership with Oracle
- Oracle's technology set featured a more simplified overall architecture
- Oracle BI improved the integration capability with Progressive's ERP systems

### **Why Was KPI Partners Chosen?**

As the most experienced systems implementation partner focused on Oracle BI & EPM, KPI partners was chosen because of their expertise with business intelligence tool migrations, specifically with Business Objects. KPI Partners has successfully executed the world's largest and most complex migrations of Business Objects to Oracle Business Intelligence.

With over 20 migrations under their belt, KPI developed a proprietary methodology for BOBJ to Oracle BI migration. This methodology has successful driven projects at such organizations as Bank of Hawaii, St. Jude Medical, and Cox Communications. The Cox Communications project was the largest known migration to Oracle BI with over 1500 reports and 25 universes of Business Objects.

KPI Partners also offered global delivery capabilities that leverage a blended-shore model with a combination of high-value on-site experts and lower cost offshore resources.