



# Insurance broker gains powerful sales and marketing insights with Power BI-based self-service reporting from Adatis



**Sales and marketing teams needed detailed geospatial and demographic insights to know where to target campaigns. Adatis showed that Power BI was capable of delivering the required visualisations.**

## Detailed sales and marketing insights delivered by Power BI

A third-party insurance broker couldn't get the granular insight it needed to target sales and marketing campaigns effectively. It was considering investing in Tableau for self-service data visualisation, however the company's corporate IT strategy is to use the Microsoft stack. Adatis showed that Microsoft Power BI equally capable of delivering the required insights.

## The Challenge: Poor insight into demographic and geospatial data

Consumer insurance is a highly competitive market, so insurance brokers need to be smart about their sales and marketing initiatives. Accurately targeted campaigns not only generate more business, but also reduce overall sales and marketing costs – as budgets can be focused on the campaigns that deliver the best returns.

This insurance provider wanted to target its sales and marketing campaigns more effectively. However, it lacked the ability to visualise and drill into geospatial and demographic data to understand which customers might be interested in which products.

Having researched the market for self-service data visualisation tools, the broker had decided that Tableau was the right solution for its needs.

However, the insurance division is a subsidiary of a wider retail business, whose corporate IT strategy is to consolidate systems and data on the Microsoft Azure Data Platform and to use Microsoft solutions wherever possible.

Learning of the broker's intention to invest in Tableau, the retail group's Head of BI and MI asked Microsoft to recommend a partner to explore whether the requirements could instead be met with Microsoft Power BI. Microsoft recommended Adatis; a Microsoft Gold Partner specialising in data and analytics on the Azure platform.



Gold Cloud Platform  
Gold Data Analytics  
Gold Data Platform  
Gold DevOps  
Gold Datacenter



## The Solution: A proof of concept demonstrating Power BI's capabilities

The Group Head of BI and MI set Adatis a challenge: build a proof of concept that would demonstrate Power BI's capabilities in a toe-to-toe comparison with Tableau. The project would demonstrate how well Power BI could handle some of the insurance team's core requirements:

- Fast loading of large datasets – 250GB and over – for analysis
- Integration of different datasets to produce unique insights
- Visualisation of large datasets with drill-down ability to uncover insights
- Advanced geospatial visualisation, including zoom into individual postcode units

While Power BI is capable of delivering on all these requirements, a lot depends on the way the underlying Microsoft data platform is architected.

Adatis built a platform using Azure Data Factory, Azure Data Lake and Databricks to ingest, store and combine the supplied datasets in the cloud, and prepare them for analysis. The prepared data was then modelled using Azure SQL Data Warehouse, readying it for visualisation and analysis within Power BI.

## The Results. Powerful data visualisation and reporting on a Microsoft data platform

With the proof of concept platform in place, Adatis was able to show how the broker could easily use Power BI to visualise answers to questions like:

- How exposed is our travel insurance business for winter sports?
- Which motorway is the most dangerous in the UK?
- What is the ratio of male to female residents in each postcode?

Not only did Power BI deliver the required insights, it also met the insurance team's other key criteria. Large datasets could be processed and loaded quickly, often in a matter of seconds. Key datasets – like motor accident data and postcode data – could be easily combined. And Power BI allowed a continual zoom from high level to down to postcode-level data in one continuous, map-based visualisation.

In short, Adatis showed that when appropriately architected, the Microsoft Data Platform and Power BI could deliver everything the broker's sales and marketing teams had hoped to do with Tableau.

Now, the company can get access to powerful, self-service data visualisation and reporting, without having to circumvent the company's strategic commitment to Microsoft. The parent company, meanwhile, has gained additional validation that its Microsoft strategy can deliver the specific data and analytics functionality the business needs – all from a centralised data platform.

Adatis offer professional services specialising in data analytics, from data management strategy and consultancy through to world class delivery and managed services.

With offices In London, Farnham and Sofia they have been delivering innovative and successful solutions for clients since 2006.



Data Science



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**We love helping people unlock the power and value of their data.**

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