

Reliable and accurate planning for the health insurance sector

KPT places its trust in Qlik and Jedox for its planning and analysis work



kpt:

Executive Summary

For many years, Swiss health insurance provider KPT relied heavily on Excel for its planning activities. But as the company grew and its operations became more complex, the scale of its planning requirements exploded. What KPT needed was a professional and user-friendly planning solution with good compatibility with Qlik and Abacus. By introducing Jedox, the company has succeeded in automating its data processing work and also speeded up its planning cycles.

Key facts:

Customer

KPT

Region

Switzerland

Industry

Insurance

Department

Controlling, project management, HR

Solution

Planning and forecasting, FTE (full time equivalent) and headcount planning, resource planning

System environment

Abacus, ERP, Qlik

For more than 130 years, health insurance provider KPT has prided itself on its commitment to innovation. The Bern-based insurer is an early adopter of digital solutions and an impressive 60% of its customers use its online customer portal KPTnet. With its winning combination of state-of-the-art technology and personal customer service, it's no wonder KPT regularly scores top marks in customer satisfaction surveys.

Today KPT is one of the ten biggest health insurers in Switzerland, with over 400,000 customers and a premium volume of CHF 1.8 billion. It currently employs around 600 staff at its headquarters in Bern and other regional offices across Switzerland.

Wanted: A professional planning solution with Qlik integration

Before they started working with Jedox's partner company Business & Decision, KPT's controllers, project managers and staff were reliant on Excel for their planning work. This made HR planning tasks, such as full time equivalent (FTE) and headcount (HC) planning, resource planning and forecasting extremely time-consuming for everyone involved and left controllers with the unenviable task of collating lots of different spreadsheets. As the company grew, so too did the volumes of data that needed to be processed every month. Something had to change. What KPT needed was a professional planning solution.

The two key requirements were compatibility with Qlik and a modular design that made it easy for the software to be upgraded as and when needed. The software also needed to be intuitive to use (for both power users and business users) and have good self-service capabilities with customization options.

Mission accomplished in just five weeks

KPT's controlling experts got in touch with the team at Jedox's partner company Business & Decision, who had previously helped them with their successful Qlik roll-out. Together they introduced the Simple.Planner suite, a solution developed by B&D based on proven Jedox technology and available on the Jedox Marketplace. The solution was implemented in just five weeks – a potential record! – and has made all the difference to the end users at KPT.

Number of users

- ▶ 200

Benefits

- ▶ Faster monthly resource planning
- ▶ Improved planning overview
- ▶ Integrated planning approach for more reliable data
- ▶ Direct integration of data from Qlik and Abacus
- ▶ Increased flexibility thanks to customizable models

Warum Jedox/HICO-Group?

- ▶ Fast implementation
- ▶ Exceptional data integration
- ▶ Self-service capability
- ▶ Flexible upgrade options



„Thanks to Business & Decision, we were able to roll out the Simple.Planner suite in next to no time, replacing our old Excel-based planning system with a professional web-based solution. The modular system made the whole implementation really straightforward.“

Michael Nüesch,
Head of Controlling/Business
Intelligence
KPT

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Greater automation means more time for all-important analysis

Data processing and sharing are now automated at KPT, meaning processes are much more efficient. The Jedox platform is used for monthly resource planning and also annual/multiannual income statement and HR planning, including automated monthly distribution based on a suitable distribution key. This gives KPT's controllers, data scientists and actuaries more time to focus on the all-important task of analyzing the data, so they can gain new insights and give management key strategic advice on the different business options.

The Simple.Planner suite is easy to use and can be accessed online by staff at any of the company's sites – that can be between 60 and 100 users depending on the project. By introducing this technology, KPT has taken the first big step towards integrated planning for the whole company, from the business users in the project management teams, HR and other specialist departments, right through to the power users in the controlling team and the management board. Ever since the system was rolled out in the fall of 2020, CFO Andreas Zaugg has had no doubt it was the right decision and he's extremely proud of how quickly the company has been able to achieve greater digitization.

Advantages of Jedox for KPT at a glance:

- ▶ Faster monthly resource planning
- ▶ Better overview for annual and multiannual planning
- ▶ Integrated planning between controlling, project management and HR teams
- ▶ Direct integration of data from Qlik and Abacus
- ▶ Flexible platform with customizable models

Full steam ahead with optimized planning

As every power user knows, there is always scope for improvement and planning processes are no exception. The Jedox platform and Simple.Planner suite are a fantastic tool for identifying and implementing potential improvements. The controllers at KPT plan to reassess and adapt their planning templates in line with future requirements and are already looking for other areas that could be sensibly included in the integrated planning process.

Partner: Business & Decision Switzerland



Business & Decision is one of the world's leading management consultancies and systems integrators for business analytics, digital transformation and software engineering. The company implements customized, sustainable solutions for its customers and currently employs 100 consultants at its Swiss sites in Bern, Geneva and Zürich.