

## Nationale Suisse is developing a management information system based on TM1 software from IBM Cognos



Software Group



**The interviewee Thomas Kramer, who is responsible for cost and project controlling at Nationale Suisse, introduces himself.**

**Thomas Kramer:** „My name is Thomas Kramer. I studied economics at Basel and have worked at the Nationale Suisse insurance company in various functions since 2002. Between 2005 and 2007, I was responsible for the implementation of TM1 within the company.“

*What were the objectives being pursued by implementing the IBM Cognos TM1 software at Nationale Suisse?*

**Thomas Kramer:** „If we look at the project brief of 2005 from a present day perspective, we can see that in principle, everything that was originally planned has been implemented. The idea was to obtain a simple, flexible, standard solution that would achieve a high level of user acceptance. The system had to handle strategic planning, operative planning, premium and production planning as well as claims planning. Another requirement was the ability to provide management reporting for groups at business segment level both monthly and quarterly. Project controlling was also to be carried by the solution, and the issue of online analysis as a fast alternative to paper reports was a crucial additional issue.“

*Why did Nationale Suisse decide in favor of the IBM Cognos TM1 solution?*

**Thomas Kramer:** „Why did we choose TM1? The decisive factors were the flexibility, the outstanding performance with large amounts of data and the possibility for Excel integration. The benefits of the solution developed within the framework of the proof-of-

concept, the product's high degree of flexibility as well as the excellent price/performance ratio eventually led to the unanimous decision of the entire project group and of the steering committee in favor of TM1. The solution was implemented and put into operation within a very short period of time.“

*With which challenges was Nationale confronted with respect to the implementation of the solution?*

**Thomas Kramer:** „The greatest challenge was definitely posed by the moving targets. In April 2007, the new finance management placed additional demands on the control concept. The prerequisites for the continued implementation of the reporting concept were ensuring the data quality and the harmonization of the financial statement structure. The CFO demanded that the financials in FIS and in SAP be consistent. This meant that in the financial statement of the external reporting, the total amount per business segment and branch had to be identical to that in SAP. This had serious consequences for our system. All definitions had to be reworked. Along the feeder system's data flow i.e. that of the SAP data pool and consolidation system, deltas appeared that could not be closed. The result was that a complete redesign of the existing FIS had to be undertaken.“

*Were expectations fulfilled and what benefits are provided by the TM1 software?*

**Thomas Kramer:** „One important benefit is certainly that TM1 is a standard solution that is continuously being further developed. This means that there are no development costs at the actual software level. TM1 is easy to operate and can be quickly learnt thanks to the Excel integration. TM1 stands out both due to its high degree of flexibility in configuration as well as in the preparation of new reports. Users can create their own reports and analyses themselves using either cubes or Excel reports. For this reason, user acceptance is very high even with the controllers. On the other hand, casual users sometimes find it difficult to find their way as this is, after all, not a pure Excel application, but is rather the operation of an OLAP tool. What is also most certainly striking is the high performance in the area of analysis, in particular with large amounts

of data. We have in part built very large cubes to analyze our technical areas, and these work highly satisfactorily. As a result of this positive experience with TM1, a group-wide deployment within Nationale Suisse has, in the meantime, been planned. Planning, reporting and analysis will therefore be handled by TM1 throughout the company.“

*To what extent does this IBM software solution support Nationale Suisse in its future development?*

**Thomas Kramer:** „Thanks to TM1 and the solution realized using it, from my point of view our competitive position at Nationale Suisse has clearly improved: planning reliability has been increased and the planning in general has been simplified and accelerated. Although planning as a whole does not take up less time, we can plan and report in far greater detail within the scheduled time. For example, today the closing controls at year end are carried out using TM1 as it is simply more flexible, faster and better suited for the analysis than our consolidation system. Due to the diverse options for analysis, we currently use various controlling cockpits. Here it is not only the management information system FIS that is used, but also for example the sales controlling, which enables sales planning and reporting down to the level of the individual sales representative. Other modules include the claim controlling as a control instrument for claim management as well as the technology controlling for all industries and divisions of the non-personal insurance sector within Switzerland. Other cockpits are being planned, in particular in the specialty lines sector, as well as in the subsidiaries who have been linked to the system for several months and could therefore use TM1 locally onsite for their analyses and reporting.“



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