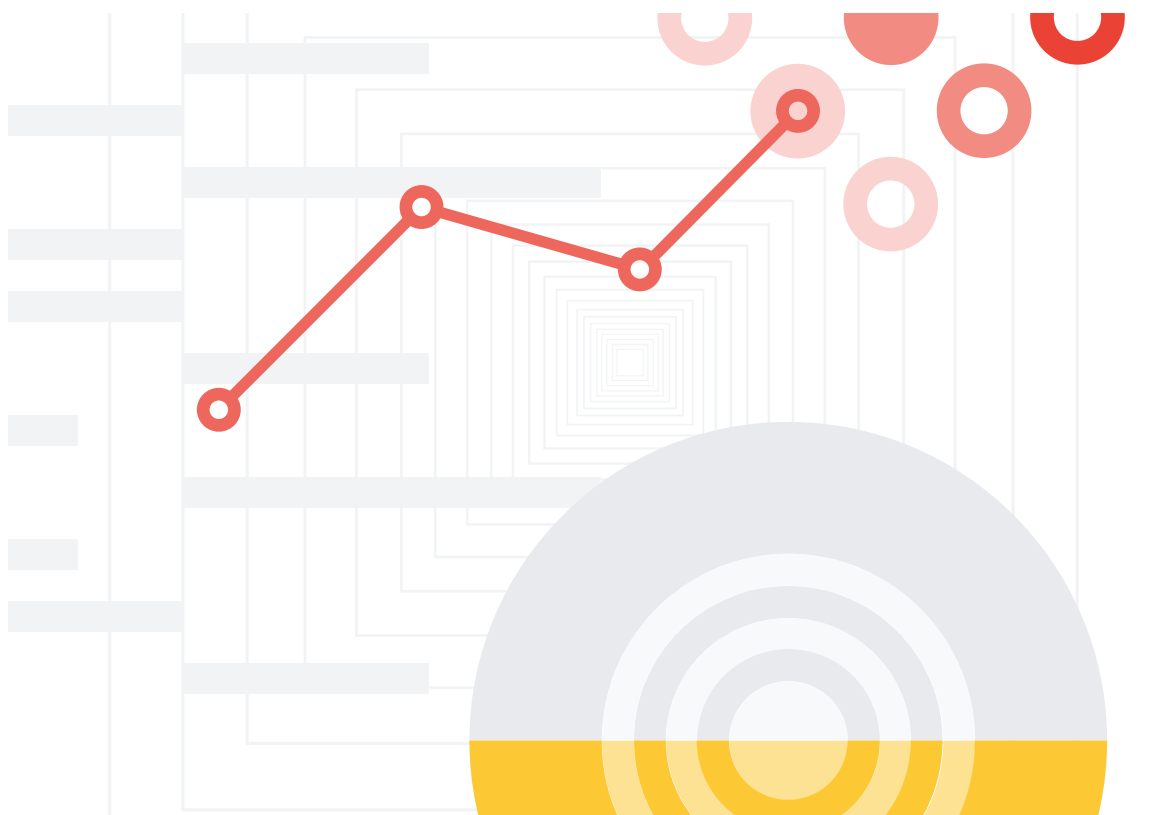# Simply Business simplifies & transforms insurance experiences with data

Founded in 2005, Simply Business provides an online brokerage service, delivering policies tailored to individual business requirements. The company specializes in public liability insurance for small to medium enterprises (SMEs) and insures over 750,000 small businesses and landlords. Using the power of technology and data, Simply Business has transformed the client experience and become one of the UK's biggest business insurance providers.

Since 2014, Simply Business has leveraged Looker to streamline data access and deliver actionable insights across the organization. Over the years, they've found new ways to customize the way their employees experience and take action with data.

Prior to implementing Looker in 2014, Simply Business did not have a centralized data platform or process, which resulted in challenges bringing siloed information together and accessing consistent metrics. Without a single source of truth, many decision-makers across the organization spent their time manually creating their own reports. However, many of these reports and metrics didn't match up, which led to confusion and mistrust of data, and ultimately delayed decisions and action.

The insurance brokerage needed a single source of truth to unify data across its multiple applications. Additionally, since insurance is a highly-regulated industry, it was critical that information be consistent, auditable, and secure.

Getting started & stepping up data access

Initially, Simply Business adopted Looker to analyze, explore, and deliver insights from Snowplow event data on top of their data warehouse. However, employees quickly introduced new use cases, including marketing analytics to better understand their pay-per-click (PPC) spend on Google AdWords, as well as their website traffic and conversion rates.

Key Takeaways

- Centralized access to data from SaaS and in-house applications

- Sped up contact centre analytics by 99%, decreasing compliance reporting timelines and allowing the team to more quickly transform customer experiences

- Automated workflows to include predictive lead-scoring and automated priority outreach

- Company-wide analytics hub centralizes adding, defining, and accessing trusted metrics as data sources, volume, and use cases continue to grow

Simply Business built a contact centre application called Idiophone using Twilio's communication platform. The "data 'n analytics" (DNA) team was looking for new ways to help the organization discover value with data, and they saw this as an opportunity to make an impact — while further increasing Looker adoption. To ensure success, they focused on making day-zero reporting available in Looker so that stakeholders could gain immediate insights into call centre activities and speed up end-of-term closing reports.

Historically, when someone wanted to look up a call recording, a common compliance and training need, it was a manual process that took an average of two days per request. Today, call recordings can be searched and accessed via Looker within minutes after a call ends. This new process not only makes it easier for the team to access, learn from, and improve call quality, but also decreases a previously manual process by 99%.

One of the keys to Simply Business's sustained innovation with data is due to the team's focus on people as much as technology. Since this new call centre use case resulted in an increase of daily active Looker users by 150%, the DNA team knew it was important to host tailored training sessions, as well expand their library and usage of documentation and training videos. "It was not only a big step up in the number of people using Looker every day, it was also a big step up in the data we're generating that we can then use to provide insights and actions in our applications," points out James O'Hare, Data Architect at Simply Business.

Segmenting audiences for targeted outbound campaigns

Before Looker, the electronic customer relationship management (eCRM) team, part of marketing, created audience segments and campaigns by manually loading large customer files into their email tool, ExactTarget, that had a cumbersome, manual, and time-consuming user interface.

" We are applying platform thinking in order to create a self-service data structure."

James O'Hare, Data Architect at Simply Business

Google Cloud

Today, this process utilizes integrations with Looker and Simply Business' internally built application named "CONTACTS Framework," which consolidates customer contact details collected from a wide variety of sources. This information is also combined with product, demographic, geographic, and behavioural attributes to provide teams with the ability to segment audiences and deliver responsive email campaigns.

For example, with landlords who own homes in London, an eCRM manager can easily create this audience segment in Looker and schedule an outbound communication campaign with ExactTarget.

This change has already improved time-to-value and improved customer experience. It has removed significant portions of the manual work previously required to gain insights and the Simply Business team plans to automate that process even further with Looker.

Monitoring lead-scoring algorithms

In addition to their in-house contact centre application and CONTACTS Framework tool, the Simply Business team has also developed an in-house offline contact management system called "Full Contact," which uses Kafka to collate data points from various applications. It then applies machine learning algorithms to determine how and when to contact customers. Next, it notifies Simply Business' SMS, email, and call centre applications with instructions about what to do, when, and in what order to predict optimum success and customer convenience.

The most important element of the system is the lead-scoring component. "An algorithm ranks leads that come from our website so people can be contacted in priority order," says O'Hare. "We use Looker to track and monitor the performance of this algorithm."

" An algorithm ranks leads that come from our website so people can be contacted in priority order. We use Looker to track and monitor the performance of this algorithm. This is only possible with the data infrastructure and culture we've built with Looker."

James O'Hare, Data Architect at Simply Business

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Leveraging Looker to assess regulatory compliance

The insurance industry is highly-regulated, and all customer service representatives are required to provide customers with important information when selling insurance over the phone.

Historically, Simply Business had to solely rely on a manual review of a certain percentage of phone call recordings to ensure customer service representatives were meeting these regulations. Today, Simply Business has built a neural network using Amazon SageMaker that scans a phone call transcript to assess whether the correct scripts are being used. After a call, the event data from Twilio is sent to Looker, which monitors the performance of this neural network – and Simply Business employees can access call recordings within minutes.

"We're not only automating how we assess compliance, but further improving our relationship with customers by ensuring we're doing the right things by them," O'Hare shares.

Scaling up a company-wide analytics hub

Today, the DNA team is a multidisciplinary team of BI analysts, data engineers, data scientists and insight analysts. As the demand for data has grown, the team's structure and data architecture have also evolved. "We funnel back-office data into Snowflake, where we use data build tool (dbt) to build demand data models. We use Snowplow for web application and contact centre event data. Kafka powers most of our applications, and we have custom-built input/output applications that load data from various external sources. Looker sits on top of all this," describes O'Hare.

Over time, Simply Business' usage of Looker has organically evolved from exploring web data to powering KPI reporting and action across the organization. Along with the benefits of scaling usage, the DNA team has also had to standardize processes for adding and defining new business metrics. "As people, applications, and data volume grow, you also open up opportunities for data silos and inconsistency to grow," explains O'Hare. "We have to ensure

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James O'Hare, Data Architect at Simply Business

Google Cloud

consistency across our applications with a single source of truth – and that needs to be a constant priority."

To scale and improve their data quality, as well as their documentation and workflows, Simply Business built an "Analytics Hub" using dbt, Looker, and Snowflake. As O'Hare shares, "The Analytics Hub is a central point for people in the organization to build data models and their accompanying documentation. This allows us to improve data accessibility, discoverability, and maintainability."

At this time, Simply Business also came up with the concept of "core data." O'Hare explains, "We wanted to create core data sets that represented the demands of the business that could then be used by other applications and other teams. We didn't want those people to be writing the same queries again and again with slightly different logic, which can lead to questions and inconsistencies down the line. Consistency should always be the end game. This was another big step in making the data platform scalable."

Creating data-driven experiences and enabling expansion with Looker

With custom applications, integrated insights, and automated workflows, it's not surprising that Simply Business has won multiple awards for their innovative use of data — they intentionally create data-driven experiences to help their team members continually transform the client experience.

This success is not just due to the tools they use and build, but also to the data-driven culture they continue to prioritize and maintain. As O'Hare concludes, "We position data as an internal product; people know that data isn't solely used for powering one specific application. It's going to be used at very different points of the pipeline and across the whole ecosystem."

The company's focus on data improves existing processes and adherence to regulatory compliance, and is fueling its growth and scale for international expansion.

" By positioning data as an internal product, people know that data isn't solely used for powering one specific application."

James O'Hare, Data Architect at Simply Business