



**THOROGOOD**  
Get the full picture

## Fast and Flexible Management Information For Emerson, Reid & Company

**Emerson, Reid & Company is a successful Employee Benefits General Agency with over \$2.5 Billion in insured premium. The company has marketed its policies entirely through independent brokers for 35 years and has a strong network of brokers in the Northeast.**

- Background** The company's core systems manage the vital relationships with brokers. These systems had provided management information for some years but it had become clear that a technology limit had been reached. The time had come to re-architect the management information provision so that it could efficiently support future growth in the scale and complexity of the business.
- Objectives** The objective was to provide a reporting and analysis capability over and above the existing functionality, realize gains in speed and ease of use that would save valuable time for front line managers and to provide the flexible and scalable platform that would meet the future needs of the business.
- Solution** The solution had to combine information from multiple sources and reconcile it exactly. New and improved business rules were to be applied to the information. The information had to be easily accessible and easy to use. The solution had to be flexible to accommodate new information, economical to roll out to everyone in the company and scalable to accommodate future businesses growth.
- Technology** The solution used Microsoft BI technology. Management information is accessed through SharePoint with a SQL Server backend that loads, transforms and stores the data and provides the fast and flexible analysis and reporting capability with easy to use Excel as a front-end tool. This provides a single source for the new management information; for finance, for commissions and for quoting reports. The finance functionality includes provision for dynamic commentaries. SharePoint will now be progressively extended to users throughout the company as a shared information resource.
- Outcome** The CFO is very pleased with the improvements to functionality particularly the ease with which forecasts can be made. Key business analysts are impressed with the accuracy of the data in the system and now trust the data completely. They are also impressed with the ease of use.
- The client proposes to extend the system to incorporate client relationship management data (such as sales targets and sales activity measures) with the goal of improving the effectiveness of sales activity.
- "Thorogood took the time to understand our business, and provided us with a tool to better analyze the business. This enabled us to improve our business rules which resulted in even better reporting and analysis."*  
**Chief Operations Officer**
- Thorogood** Thorogood are experts in the creation of purpose-built management information systems using standard technologies; systems that facilitate the management of scale, complexity and risk. Our small and highly productive teams provide elegant solutions at globally competitive costs.

**To find out more, contact Evelyn Heyes in the UK:**

Thorogood Associates Limited  
Building E, Ealing Film Studios, Ealing Green, London W5 5EP  
**T** +44 (0) 20 8231 0800 **F** +44 (0) 20 8840 2420  
Contact\_UK@thorogood.com **www.thorogood.com**

**Or Trevor Jones in the US:**

Thorogood Associates Inc.  
100 Overlook Center, 2nd Floor, Princeton, New Jersey 08540  
**T** +1(609) 375-2360 **F** +1(609) 375-2001  
Contact\_US@thorogood.com **www.thorogood.com**