GSTEP
business intelligence

CASE
STUDY

GSTEP implements Sales app at Lusitania

In order to maximise the response capability of the Sales Network, in what concerns requests analysis (acceptance, acceptance with alterations or rejection), Lusitania has equipped this area with a fast, agile electronic channel. Available 24/7 and accessible at all levels of the Sales hierarchy, the new mobile application (app) is fast, intuitive and controllable.

> **"**We managed to implement an innovative, agile solution in only one and a half months, thanks to the commitment and professionalism of GSTEP and MicroStrategy. We are currently measuring the mean response time to requests and performing year-over-year comparisons, in order to evaluate improvements. Nevertheless, the feedback we have already received from the Sales Network has been very positive. Sales teams can use the app to process requests, which eliminates the need for a laptop!**"**

Alexandre Ramos
Organisation and IT Manager at Lusitania Seguros

LUSITANIA
Grupo Montepio

The Challenge

Already an example to follow in what concerns innovation and implementation of the best technological solutions, Lusitania, one of the largest Insurance Companies in Portugal, has now launched a new app.

The objective of this app is to maximise the response capability and speed of the Sales Network, in what concerns the analysis of requests submitted by Brokers (acceptance, acceptance with alterations or rejection).

A simple touch is all it takes to view all information required for a robust, albeit fast and efficient, decision-making process.

Nonetheless, a project of this type entails a series of challenges, including the following:
• Development of a mobile application (app)
• Available 24/7
• Fast
• Intuitive
• Controllable
• Accessible at all levels of the Sales hierarchy

As no mobile application was available at Lusitania for this purpose, Sales data processing could only be performed via a PC/Desktop, which forced Sales teams to use their laptops and 3G dongles to access the central system.

However, the Insurance Company felt the need to speed up requests analysis, in order to maximise business efficiency.

The many projects jointly developed by Lusitania and GSTEP and its partnership with MicroStrategy were determining in the choosing of GSTEP to implement this project.

The Solution

A mobile solution developed by MicroStrategy was implemented by GSTEP in order to meet the challenges faced by Lusitania. This was the only solution that combined two key features: it allowed for transaction processing and did not require the development of a dedicated application, as the platform used includes an implementation model whose framework does not require further development.

The app can be accessed by the entire Sales network. An additional feature was included in order to allow team leaders and managers to access/view information entered by sales reps, thus allowing for a goal-oriented, albeit healthy, interaction. The project was implemented in only one and half months by a team consisting of 3 Consultants (1 from Lusitania, 1 from GSTEP and 1 from MicroStrategy).

GSTEP participated in the implementation of the app, having thus gained valuable knowledge in the app development area.

Results

The implementation of this project resulted in the following advantages for the Sales Network:
• Faster response to business requests
• Increased control of pending business requests
• Increased business control by team leaders and managers
• Increased mobility
• Increased Broker satisfaction
• Increased operating income, as a result of faster business processes
• Increased Sales

GSTEP has worked in partnership with Lusitania for several years, having developed all Business Intelligence (BI) solutions used by the Insurance Company and implemented budgetary control and budget projection solutions. The latest project jointly developed by both companies involved a Big Data solution, which was fully implemented by GSTEP.

The two companies expect to continue working in partnership, namely concerning the implementation of future BI, analysis and mobile solutions. The Insurance Company intends to use BI tools to analyse trends in several areas of its business.

Key Figures

• App available for IOS and Android devices
• Mean function invoking and execution time < 3 seconds
• Online data synchronicity
• Simple app, easy to use; no training required
• The Sales network does not need to use a PC to analyse and process requests

About Lusitania

Part of the Montepio Group and entirely owned by Portuguese shareholders, Lusitania is one of the largest Insurance Companies in Portugal. With more than 25 years of experience, Lusitania is a future-oriented company and a trustworthy business partner whose goals are to generate economic and social value and to make a decisive contribution to the progress and wellbeing of the community.

About GSTEP

GSTEP specialises in Business Intelligence (BI), Enterprise Performance Management (EPM) and Business Analytics (BA), boasting in-depth knowledge and extensive experience in a wide range of technologies. Employing a highly qualified senior team comprising dozens of certified technicians in a vast variety of BI and EPM technologies, GSTEP is a leading company in Portugal, Europe, African and Middle Eastern markets.

Edifício Atlas I
Av. José Gomes Ferreira, 9 - Sala 22, Miraflores
1495-139 - ALGÉS
PORTUGAL

T +351 218 077 880
F +351 210 435 919

geral@gstep.pt
www.gstep.pt