Digital Insurance Agency AP Intego Enhances Service and Revenue by Using Dremio to Gain 360° Customer View

CUSTOMER

AP Intego
https://apintego.com

GEO

United States

INDUSTRY

Financial Services (insurance)

OBJECTIVES

Enhance sales and service by bringing multiple siloed data sources together into a 360-degree customer view.

CHALLENGES

- A competitive market where they need to provide customers with quick access to best price policy options
- Unable to integrate multiple disparate data sources into data lake-based AP Intego system
- Could not access all customer data in one place

SOLUTION/DATA ENVIRONMENTS

- Data sources: Redshift, Parquet, CSV, Salesforce via JDBC/ODBC connection, Zendesk, Applied Epic
- Storage: Amazon S3 and EFS
- Compute: Dremio, EC2, Redshift
- Applications: Jupyter Notebook, Pandas, Looker

RESULTS

- Can now join multiple data lake-based sources with sub-second performance
- Self-service capabilities for sales, service and customers
- Faster insights for business intelligence with daily automated reporting
- Dremio enables 3x faster provisioning of new data sources and platform features
- Analysts can now explore their 10 major data sources on an ad hoc basis using the Dremio web interface, BI platforms and data science tools
- Rapid prototyping of new features and services

Summary

AP Intego is improving customer service and revenue by using the Dremio data lake engine to integrate customer data from multiple sources into a single 360° customer view.

The Business

AP Intego is a leading digital insurance agency and one of the nation's fastest-growing insurtech companies whose goal is to simplify the purchase, use and renewal of insurance for small business owners. Through technology integrations, AP Intego offers a full line of property and casualty insurance options to the small business customers of hundreds of tech, payroll and other affinity partners. The company also provides customer service, flexible billing and a self-service, online customer platform to its more than 60,000 customers. Based in Waltham, Massachusetts, AP Intego works with 19 A-rated insurance carriers and is licensed in 50 states.

The Challenge

AP Intego operates in a fast-paced and competitive market where they need to quickly provide clients with information on the best price and best fit insurance options. However, it was impossible for their sales and service reps to get quick access to a full view of a customer's information to proactively provide service recommendations. This information lived in multiple siloed data sources like Apache Parquet and CSV in their data lake as well as Salesforce data via ETL processes that required extensive labor and time to integrate into AP Intego's systems.

Before Dremio, AP Intego had to write and maintain ETL pipelines to integrate their various data sources or DevOps-intensive tools. They initially tried implementing an Amazon Redshift data warehouse using Python scripting; however, as a small team juggling a lot of requests, they needed a solution that didn't require a lot of Python and general data pipeline development. They then tried to load everything into a Redshift data warehouse via Amazon S3, but this became difficult to scale effectively as the number of data sources grew.

The company's goal was to create a 360-degree customer view by integrating multiple data sources into a single data lake that enabled queries across all of their data. They wanted a solution with consistently fast performance at a reasonable cost, and the ability to integrate data operations and engineering to build new applications and functionality.

The Solution

AP Intego first learned about Dremio at the 2018 Data Council conference in San Francisco and decided to try the Dremio Community Edition (CE).

AP Intego's Amazon Web Services (AWS) data lake includes S3 data lake storage, Amazon Elastic File System (EFS) cloud file storage and Dremio. They are now able to integrate new data sources with a minimal amount of DevOps integration and gain the benefit of highly performant queries via their Looker BI dashboards.

"Dremio is a critical part of our enterprise," says Matt Knoop, AP Intego's Director of Data Science and Analytics. "We use it for data exploration and as a back end for part of our internal and external insurance platform."

AP Intego's data sources include Redshift, Parquet, CSV files and Salesforce via an ODBC connection. They have connected Dremio to their Looker instance, which enables reporting on a much wider scope of data than they had in their data warehouse. Dremio is deployed as a standalone instance, transformations are run within a Dremio Docker container, and JDBC/ODBC connections have their own bare metal EC2 Dremio instance. They write Parquet directly to Amazon EFS and can immediately query the data in Dremio.

"Dremio allows us to have a solution that supports our business without locking us into a contract," says Knoop. "We feel confident that we've found the right partner for our data lake."
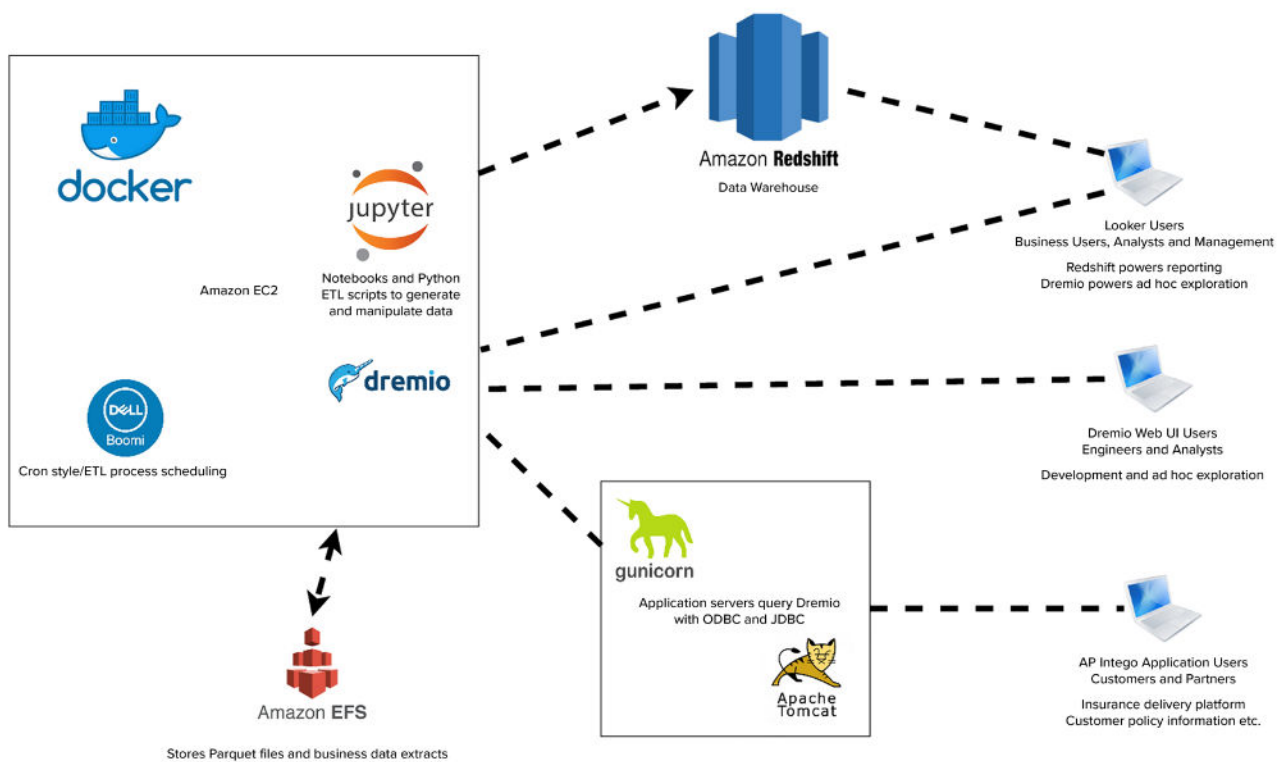
The Results

SELF-SERVICE DATA ACCESS INCREASES EFFICIENCY AND SERVICE

"Any data we put in our data lake is immediately accessible. It's now our single data source for our business users, engineers and customers," Knoop says. More than 10,000 small business clients service their policies using the Dremio-powered customer portal. And AP Intego's 100 sales and service employees use an internal dashboard to access client information via a Dremio-powered app.

JOIN MULTIPLE DATA SOURCES WITH SUB-SECOND PERFORMANCE

In the past, it wasn't possible to bring different data sources together to provide a single view of a customer's data. With Dremio, AP Intego now joins multiple sources with sub-second response times. It's now twelve times faster to put new data sources into production and implement new platform features. In addition, AP Intego is now able to run many new queries using payroll data that was previously unavailable to their analysts.

FASTER INSIGHTS DELIVERED DAILY

The company's business users can now interactively explore their 10 major data sources on an ad hoc basis using the Dremio web interface, BI platforms and data science tools. This was impossible to do before Dremio. In addition, reporting used to be done manually and only once a month. Today they have daily automated reporting, providing more immediate insights for decision-makers.

FLEXIBLE PLATFORM ENABLES NEW SERVICES

Dremio's flexible platform enables AP Intego to rapidly prototype new data sources and web services. A new customer platform that they previously projected would take years to implement, took only a month. Because of this, AP Intego is now looking at new use cases such as a dynamic workers compensation calculation that leverages the payroll information in their existing databases.

FUTURE PLANS INCLUDE:

- Expanding the number of data sources in their data lake
- Increasing the number of business users and customers who are directly or indirectly running queries against the data lake, which means more customers in the portal and additional tools for sales and service teams to leverage
- Increasing the frequency in which their data lake is refreshed

"I can't imagine running our business without Dremio," says Knoop. "We are extremely pleased and plan to continue building on it."

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ABOUT DREMIO

Dremio is a fundamentally new approach to data.

We started Dremio to shatter a 30-year-old paradigm that holds virtually every company back. Removing barriers, accelerating time to insight, putting control in the hands of the user. That's Dremio.

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