

# CUSTOMERS

## Australian Unity Empowers Decision Makers with Reporting Solution from Business Objects

*“Crystal Reports Server puts information in the hands of the people who need it when they need it.”*

*Nathan Hollis, Development Team Leader and Solution Architect, Australian Unity*



### Challenge

**Industry**  
Insurance  
Financial Services  
Healthcare

Australian Unity is a national health, financial services and retirement living company that has been caring for the financial and healthcare needs of Australians for more than 165 years. Its financial services operations span investments, financial planning and general insurance.

**Business Pain**  
Australian Unity needed a way to generate reports from its systems and provide critical information to users on call.

Australian Unity boasts one of Australia’s best-performing health funds and operates a number of dental clinics in Melbourne. The company operates 12 retirement villages across Victoria and New South Wales. It has more than 1,200 staff and approximately 200,000 members around Australia.

**Why Business Objects?**  
The Business Objects solution is agile and easy to use, allowing the IT department to create reports quickly and easily.

Australian Unity relies heavily on its call centres to attract new clients and grow existing business. However, its customer relationship management (CRM) software wasn’t up to the task. The IT team found a new solution that would provide the functionality it was looking for, but there was a catch. The steering committee wouldn’t approve the purchase without first seeing its capabilities – and that would require extensive customization.

“The new software alone was not a convincing business case,” says Nathan Hollis, Development Team Leader and Solution Architect at Australian Unity. “We needed a way to demonstrate the system’s capabilities that would be easily understood by the committee.”

**Business Objects Products and Services**  
Crystal Reports Server XI

While Australian Unity already had a variety of reporting systems in place, such as InfoMaker, MicroStrategy and Microsoft Excel spreadsheets, none provided the responsiveness the team needed for the demonstration.

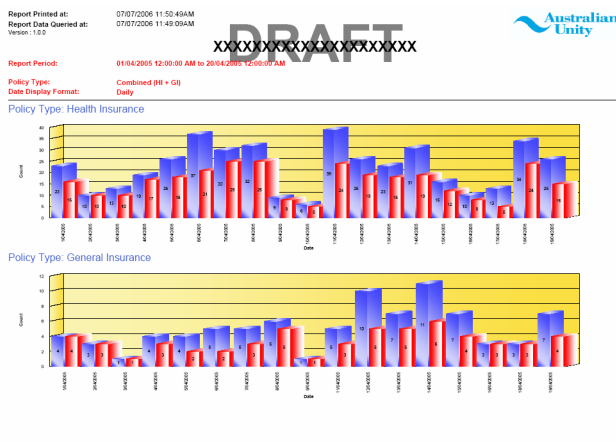
“We wanted to move away from paper reports that were hard to search and soon became out of date,” says Hollis. “We wanted a system that could provide browser-based visibility of reports and metrics.”

### Approach

The team thought Crystal Reports® Application Server version 9 from Business Objects could help. They used it to generate reports from the CRM software.

It didn’t take long for them to realise that this was the solution they’d been looking for.

“I was completely blown away by the visualization capabilities of Crystal Reports,” says Hollis. “It



was agile, it was fast and it made the reports we built highly visual and easy to read. The extensive drill-down functionality was also impressive.”

The committee was similarly impressed and gave the go-ahead for the team to purchase the CRM software. Mission accomplished! However, after experiencing the power of Crystal Reports Server firsthand, the company realized that it had the potential for a variety of applications across the whole business.

Australian Unity has since upgraded to Crystal Reports Server XI and couldn't be happier.

## Results

Australian Unity uses Crystal Reports Server to extract useful information and analyse trends from the metrics generated by its CRM system. This allows decision makers to make better use of essential customer information such as socio-economic data, interaction histories, queries and complaints. It also helps analyse the success of outbound telesales campaigns to improve the effectiveness of subsequent marketing efforts. Crystal Reports Server allows call center managers to drill down to the level of individual operators to gauge who is achieving the highest hit rates.

“The IT department constantly received requests for information from all over the business,” says Hollis. “Before we installed the Business Objects software we provided this data in an ad hoc fashion. Now we can quickly build a custom report so they have access to that information whenever they need it.”

Freeing up the IT department from these mundane requests allows developers to spend their time doing higher level tasks rather than trawling company databases for information. Using Crystal Reports Server XI they can generate reports for all areas of the business on issues as diverse as internet sales, claims histories, responses to marketing campaigns and document management.

“Crystal Reports Server puts information in the hands of the people who need it when they need it,” Hollis continues. “When reports are generated manually, they quickly become out of date. Crystal Reports lets us monitor data in real time and run up-to-the-second reports.”