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O HUB

CASE STUDY

HUB International clients get predictive insights for better business decisions

Detailed analytics prompt people-first enhancements

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HUB International (HUB) is the fifth largest insurance brokerage in the world and the largest in Canada. It provides commercial and personal insurance and employee benefits as well as retirement and private wealth consulting. HUB is the product of more than 800 acquisitions.

Company Name: **HUB International**

Industry: **Insurance**

Country: **US**

Company Size: **14,000+ employees**

Solution: **Microsoft Power Platform**

Business situation
Diminishing value in a static report

Rapid expansion has added complexity to HUB's business. The small and middle-market companies it targets for employee benefits sales have rich data but often lack the analytics to uncover improvements the data suggests. Commonly available company data can direct companies on how to add value to employee journeys. Insights from analytics can guide the decisions that matter most to employees, influencing engagement, productivity and retention for a cumulative positive impact on the business.

Prior to the build out of Workforce Persona Analysis™ (Persona), HUB's analysis of its clients' employee data produced only a snapshot in time. HUB identified the following challenges that encouraged the development of a cloud-based solution:

- Limited Excel expertise and human resources to scale the solution
- Inconsistent delivery and distribution with little visibility to use of the tool with clients
- No centralized data model or archive for higher level analysis

HUB wanted a platform to ingest business data, run analytics on workforce details and use the resulting insights to help its clients make informed decisions and forecast future success. HUB had already adopted [Microsoft Power Platform](#) and had experience with Power BI and Power Automate. But it had yet to mobilize Power Apps capabilities. It considered Persona an ideal test case for Power Apps.

Solution
Dynamic experience that tells people-first stories

HUB engaged Avanade to build new tools and capabilities on Power Automate and the analytic center of Power BI. In the first four weeks, the project team worked to understand what the Persona tool was and create an approach to Persona modernization:

- A Power Apps instance ingests data and produces detailed analytics to the employee level.
- Power BI reveals producers and sellers working through the app and their use cases, quantifying the new revenue they capture.
- Dynamic Power BI reports of Persona analysis show HUB clients predictive insights into their workforces and make them part of the data experience.

> "Power Platform, Power Apps and workflow optimization are driving HUB's innovation and will give many of our teams back thousands of hours a year – hours better served having strategic and consultative interactions with our customers."
>
> **BJ Murray**
> Vice President of Enterprise Data and Analytics at HUB

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"Power BI has facilitated a much better conversation with our clients," says Jeff Faber, chief strategy officer for employee benefits at HUB. "It's the customer experience we were looking for. When they get to see their data, when they can see us leverage their collective data for their benefit, they're excited about what we can do for them."

Through a business app, users complete an analysis that becomes the foundation for a client conversation. "For the last 40 years, we tended to talk about insurance policies. We have shifted from, 'How is your PPO plan running?' to start with people – 'How are your people doing? Are they single parents, financially fragile, empty nesters?'" says Faber. "Now that we better understand your people, we can answer, 'Is your portfolio of benefits offerings appropriate?'"

To meet HUB's goals, Avanade also developed:

- A centralized database in Power Platform that stores client employee data so HUB can show the employer demographic, geographic, tenure, professional development and other trends in its organization.

- An improved experience for the business so they use the tool more frequently, share it with at-risk accounts to retain and grow them and offer it for a fee to convert sales prospects.

- Benefits SmartView™, which surveys clients about existing and future employee benefits for scoring and benchmarking against their peers.

Results
Value-add analysis and macro-level workforce trends

In 20 weeks, HUB received a live analytics solution and database that would have taken six months to a year to build without Microsoft's low-code/no-code technology and a knowledgeable partner. HUB's Persona database can be explored and segmented to understand employee cohorts. That empowers current HUB clients and creates new opportunities, including workforce trend research.

"Now both clients and account executives are more invested in our analysis tool because they can use the data themselves," says Faber, rather than run it through HUB's IT department. The new Persona solution enables powerful and tailored client conversations without a lot of lead time.

- HUB sellers can identify cross-sell and upsell opportunities for each client and consult on targeted employee communication, career development support and business expansion in ways unrelated to insurance.

- HUB has a broad dataset and AI/machine learning potential through which it can develop new trend reports to sell to the market.

- 1,500 HUB sellers use the Persona tool.

Persona is a foundational piece of how HUB engages clients in strategy, retains business and grows revenue. "Increased retention is good for business and great for our people," Faber says. "Our client conversations have made us a true business partner to our customers, whose employee benefits decision-making extends beyond traditional benefits to those they want to put on their roadmap."

"When you put the employee at the center, everything is better," he adds. HUB's continued and unwavering investment in innovation, through its development and delivery of digital transformation products results in more clients deploying solutions based on their actual needs. "Providing our clients with what they need when they need it could not be higher on our list of value props," says Faber.

> "A big part of our success has to do with the consistency in delivery. Avanade makes these things possible. They've been intimately involved in our business. They're not just here to deliver a project and move on. There's been a significant investment from Avanade in HUB."
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"It is an exciting time to be at HUB! Our commitment to innovation, via tools and technology, not only provides our clients with a fresh perspective on how to support their employees, but also provides efficiencies and a more consultative approach to our own teams," says Vinka Bedrossian, director of operations and strategic initiative for US employee benefits. "On behalf of our customers and employees, we could not be happier with our partnership with Avanade."

About HUB International

HUB International Limited is an insurance brokerage providing an array of property, casualty, risk management, life and health, employee benefits, investment, and wealth management products and services across North America. HUB has more than 375 offices across the United States and Canada and more than 10,000 employees. It is based in Chicago, Illinois.

About Avanade

Avanade is the leading provider of innovative digital, cloud and advisory services, industry solutions and design-led experiences across the Microsoft ecosystem. Every day, our 56,000 professionals in 26 countries make a genuine human impact for our clients, their employees and their customers. Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Learn more at www.avanade.com

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