

# CLIENT SUCCESS STORY

## Insurance Commission Analytics Engine

### PROBLEM

Specialty finance company driving growth for Medicare agencies by buying their future commissions upfront for cash. They provide liquidity to agencies by providing returns on their commissions ahead of time. They purchased tens of thousands of policies from a large number of agencies and brokers. Their profit is derived from margin between price paid for policy and commission earned from policy.

They required a solution that would provide them:

- Near real-time visibility of the policies they own
- Tracking of commission made against each policy
- Analysis of profit made by policy, client and end consumer

### COMPANY HIGHLIGHTS

#### Division

Medicare

#### Technologies

Power BI, Power Automate, Azure Data Factory, SQL Server



**Tim Watson**

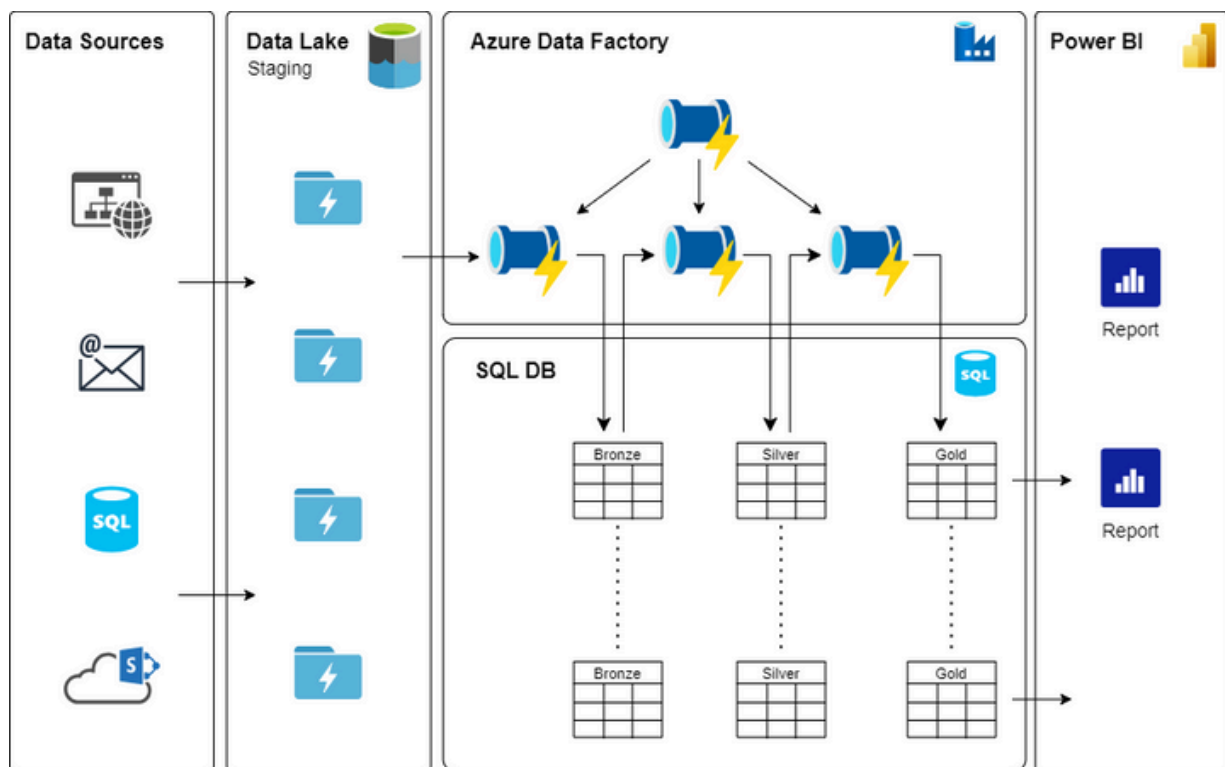
Author,  
Partner

## C H A L L E N G E S

- Agencies do not provide B2B interface for commission statements
- Commission statements have inconsistent formats
- Frequently onboarding new agencies and hence new data feeds
- Require audit trail of all inserts, updates and deletes performed on data

### Commission Statement Loading and Normalization Engine

- Web scraping
- Robotic Process Automation (RPA)
- Medallion architecture
- Dynamic metadata driven Data Factory pipelines



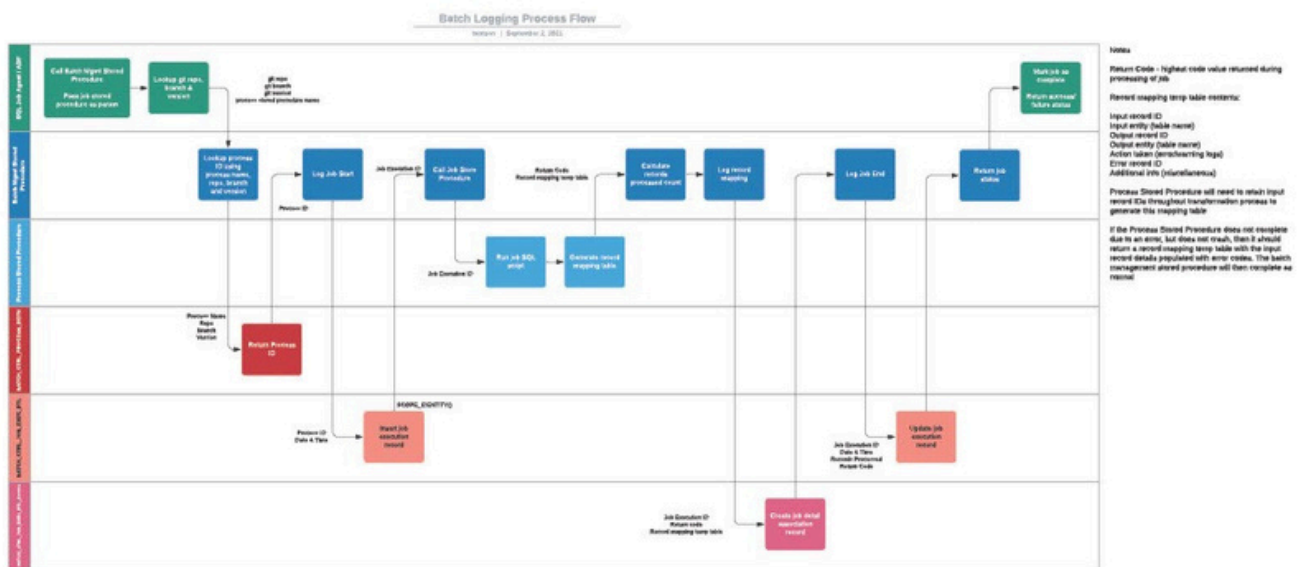
Solution Architecture

### Metadata Driven Data Factory Pipelines Components

- Data factory dynamically creates pipelines at run time based upon metadata;
- Metadata stored in DB, includes:
  - Configuration of pipelines
  - SQL queries to be run in DB
  - Business logic to transform commission statements into normalized format
  - Mapping of source table fields to destination table fields

## SOLUTION AND RESULTS

- **Consistency** - High-level process changes can be quickly propagated for all data sources
- **Scalability** - New data sources can efficiently be added to the pipeline with minimal effort
- **Simplicity** - Separating the business logic and the code allows non-developers to understand and even modify details for any data source



Batch Logging Process Flow

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