



RPMI

Case Study: Business Intelligence & Data Warehousing

Client Overview

RPMI manages the pension needs of over 200 clients and cares for over 500,000 scheme members. Its primary client is the Railways Pension Scheme (RPS), the fourth largest in the UK and one of few final salary schemes still in existence. It manages, on behalf of the RPS, £19bn of assets. Its third party book of business includes household names such as Zurich, Credit Suisse and Fidelity.

Client Response

“We need to have our finger on the pulse of what’s happening within the individual business streams so we know with confidence that everything is running well. We have to be able to demonstrate this to our trustees. The information is now there for us to be able to do that.”



Key Benefits

- Dashboards have replaced 400 page documents.
- The business shares information and can comment and discuss collaboratively.
- Management time has been optimised.
- Existing assets have been further utilised, enhancing their ROI.
- Existing user knowledge and skills have been utilised.

Held back by manual performance monitoring

Having reorganised into four new business areas, the recently formed executive management team's progress was being hampered by the lack of automated and readily available performance information. Without this, the task of monitoring progress against business streams and corporate dashboards was very time consuming. As such, it was spending most of its valuable monthly management meetings looking at past performance rather than future direction.

Finance Director, David Teasdale and Head of Group IT, John Day initiated a scorecard and dashboard project to remove the reliance on manual reports. "As a business, we wanted to be more forward facing rather than constantly looking in the rear-view mirror," says Day. "A corporate-wide dashboard would give us vastly improved access to operational performance and when incorporated with a scorecard approach we would see our progress against our business strategy."

Integrating technologies to sweat the assets

In 2002, Simpson Associates had built a number of Cognos BI point solutions for RPMI and 5 years later, extended them across the Finance operation. The business wanted to continue to benefit from this Cognos investment, but alongside a transition towards a Microsoft platform.

"We wanted to use Cognos for the analysis and reporting model, but present the information through SharePoint.

We were determined to go down a Microsoft route due to the significant investment already made in SQL, Windows and SharePoint."

John Day

Head of Group IT

SharePoint would also lend itself to RPMI's mobile strategy. "We know our direction of travel is correct," says Day. "With the Microsoft Surface available this year, we will make the dashboards and scorecards available through these new devices."

A challenging project

As a trusted partner and one of very few companies with the skills to integrate Cognos and SharePoint, Simpson Associates was an obvious choice for the dashboard and scorecard project. But RPMI was about to set an interesting challenge.

"We worked with Simpson Associates to clearly define requirements.

It was vital that Simpson Associates understood what we were trying to achieve, and because of the relationship we have, there was a level of trust and commitment that we could work with each other to define the project. They did an excellent job in establishing this."

John Day

Head of Group IT

Technical Architect, Giles Horwood, made the critical calls on how best Cognos could be integrated with the advanced capabilities of SharePoint. He says, "My challenge was to interpret what RPMI wanted to achieve and say what would and wouldn't be possible within the two technologies. With our project experience, we could ensure a common understanding of the deliverables - and the challenges."

Day says: "We learned a lot of lessons and now see this implementation as a baseline and foundation for future projects. We were very happy with what they delivered, we always knew where we were in the project, issues were brought to the table at the right point and risks well managed."



“We can now easily see whether we are on target against our dashboard metrics. We can drill down into specific performance areas across our business groups to look in detail at items such as profit and loss, employee statistics, including absenteeism, and service levels.”

John Day
Head of Group IT



Extending use of SharePoint

Simpson Associates built a management information dashboard which provided around 50 menu-driven views, with drill-through capability to further details and with user-based security applied.

This Cognos framework sits on a SQL Server data warehouse that pulls around 95% of its data from internal systems. The other 5% of data, largely external benchmarking information, is entered manually on a quarterly basis.

SharePoint was already being used for the RPMI intranet, and to satisfy RPMI's document management aspirations. Simpson Associates developed a themed SharePoint web portal to render the Cognos dashboard and make this available alongside other corporate information. The portal uses the blog functionality in SharePoint to allow context sensitive commentary to be appended to the data. Users can also start interactive discussions on specific metrics.

Real time performance monitoring

Importantly for David Teasdale and the Executive Management Group, this performance monitoring can now be done throughout the month and without time-sapping manual effort.

"We've stopped producing our 400 page documents. We can now walk into the meeting having already reviewed the metrics for the previous month. All we need to do is check whether there are any queries on the Dashboard content and then we can get on with what we should be doing.

We're flying through the agenda now. We are talking about productive items and managing by exception, rather than reading long reports. These benefits aren't confined to management meetings."

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David Teasdale
Finance Director



Template for future projects

The dashboard project was always intended as a template for further dashboards across business and operational units. To this end, Simpson Associates ensured a high level of skills transfer. "We now have the skills we need to do more of these projects ourselves," says Day. "I have a project and technology model that will lend itself to more and more dashboards."

Support from Simpson Associates

Simpson Associates are specialists in defining, building and implementing information management solutions, which provide better business understanding and improved business management performance.

Our considerable skills and experience enable long-standing relationships with our clients and we have principal partnerships with Microsoft, IBM Cognos and BOARD.

"With this structure that we have put together with Simpson Associates, we don't have to go through another large implementation; we just have to define the dashboard requirements and put it in place within the existing template."

John Day
Head of Group IT

Contact us

Should you have any questions or require any further information, the team at Simpson Associates will be happy to help you with your request.

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