

Customer Case Study: HBF Health Ltd.

Alation Helps Australian Health Insurer
Reduce Risk by Improving Data Consistency



- **Industry:** Healthcare, Insurance
- **Headquarters:** Perth, Australia
- **Interesting Fact:** Provides private health insurance as a not-for-profit, member-based business

Facing the Challenge: Reduce Risk While Expanding Data Availability

As a member-based not-for-profit health insurer, HBF constantly seeks to better understand its members to provide greater value for their premiums. Understanding members starts with data, something that HBF has in abundance, and ensuring that this [data is protected](#).

To corral decades' worth of data from multiple on-premises systems into a single source of analytics truth, HBF decided to [migrate its data to a cloud-based ecosystem](#). The organisation's goal was to enable users across the company to find, track, and gain insight from the data. To achieve this, HBF needed to boost data consistency and literacy throughout the organisation.

"We needed to focus on the consistency of definitions," says Drew Goodchild, Head of Data & Information Management at HBF Health. "For example, different parts of the business had different perspectives on how to measure key data, which introduced diversity of definition. We needed a method to agree, publish and expose organisational definitions and metrics." With more consistent data definitions and deeper customer insight, HBF could ultimately make better decisions for its members.

Business Results



Increases Data Literacy:

Users understand where data is, what it means, and if it's fit for purpose



Boosts Trust in Data:

Data is consistent across the business for reports and decision-making



Reduces Risk:

Data is accurate, assisting business reporting

“If people don’t understand what the information is, what it’s telling them, where it originates from or even where it’s going to, they’re missing a significant part of the value of that data.”

Dan Clements

Senior Information Management Specialist, HBF Health Ltd.

Giving more of its people access to data meant that HBF also needed to change the existing way it tracked and protected that data across the business. HBF needed to update its existing controls on the flow of data through the company’s systems and update existing policies to keep data secure. Considering this, HBF would need a data governance and lineage tool.



Finally, HBF also wanted its people to collaborate around data, to share information across departments and business areas. As Goodchild says, “We needed the right amount of governance, a lot of communication and collaboration, and to update our existing processes to support the key security and lineage piece.”

With those goals in mind, HBF worked with Deloitte Consulting to find a [data intelligence](#) platform that would meet these needs. That search led them to Alation, a data intelligence and [data catalogue platform](#).

Guiding Users to the Right Data

Goodchild describes the [cloud migration and transformation](#) effort at HBF as “massive.” For example, the company is assessing and migrating thousands of CRM tables into the cloud. It is building a comprehensive cloud data management ecosystem, and in the middle sits the [Alation platform](#) to make sense of all that data.

“Our cloud analytics stack works exceptionally well as an ecosystem, and we intend to use Alation to catalogue all that good data for analytics,” says Goodchild.

HBF pulls data into the data platform from the data lake. It then uses [Business Intelligence \(BI\)](#) reporting and insights. Alation can index the BI reports to enable users to run common reports easily from Alation.

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Head of Data & Information Management, HBF Health Ltd.

As data is migrated to the cloud, built-in [Alation connectors](#) capture the metadata to provide context around the ingested data. Articles in Alation help business users understand where to find the data, what it means, and why it is important. Trust Marks let users know what data is safe to use, and what should be avoided. And for technical users and analysts, the lineage function in Alation shows connections between data elements and lets people trace the data back to its source.

HBF is also using the lineage feature to track personal information data lineage and usage to further bolster its existing protections for members' personal information. External tools interface with Alation to identify which databases contain personal information, enabling a deeper understanding of potential risk and exposure.

HBF is promoting the use of Alation for users across the business to access the company's data for their own purposes. “Aside from our technical data folk, we have a data ownership and stewardship model, with key business subject matter experts and accountable stakeholders needing to understand the data and information. The stewards are critical to collecting, collating, and curating business metadata and definitions for consistency,” says Goodchild.

Improving Data Confidence

To assist with the accuracy of business reporting, HBF is using the Alation data glossary to provide definitions around key terms such as “member” or “policy.” Previously, this kind of context was contained in various spreadsheets or notes, and it differed between business units. The result was an inconsistent understanding of the data especially among business users. Having a single source of truth and clear definitions of key terminology rectifies this problem.

As the cloud transformation continues, Goodchild intends to build upon HBF's strong [data culture](#). “We're on a journey to promote Alation within our business, through [data stewards](#) who understand the data to people who need to use and analyse it to create valuable member insights,” he says.

Reaping the Benefits of Consistent, Available Data

- **Increases Data Literacy:** Users understand where data is, what it means, and if it's fit for purpose
- **Boosts Trust in Data:** Data is consistent across the business for reports and decision-making
- **Reduces Risk:** Data is accurate, assisting business reporting

By creating a single source of truth about its data, HBF will improve [data literacy](#) across the company. Consistency in defining key terms will improve business reporting.

"Data consistency is huge for us," says Goodchild. "We want to have one view in Alation that means the data is dependable and reliable."

As consistency increases, so will trust in the data. Having a single source of truth from which to draw will assist with the accuracy of reports. The company will be able to make strategic decisions based on this information and customer insights to provide new and better services to members. Notes Dan Clements, Senior Information Management Specialist at HBF Health, "The data must be as close to 100% accurate as we can possibly get."

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HBF is focused on further bolstering its existing control measures. Alation helps HBF balance risk and compliance with data access and [democratisation](#). Alation helps HBF to know who is using its data and how they are using it. And, by tracing the lineage and use of that data, HBF can increase its existing protections to keep data safe.

Enabling the Art of the Possible with Alation

What lies in the future for HBF and Alation? Goodchild likes to talk about the art of the possible. "We're looking at what else we can do to add value," he says. "We want to get creative about using Alation to improve data literacy and democratisation, while making sure data is protected."

Clements is focused on continuing to educate people about data. "Education is so important within the data space," he notes. "If people don't understand what the information is, what it's telling them, where it originates from or even where it's going to, they're missing a significant part of the value of that data." Both feel that they've barely scratched the surface of what Alation can do for them as they build out their cloud data platform and ecosystem.

"We want to get creative about using Alation to improve data literacy and democratisation, while making sure that data is protected at all times."

Drew Goodchild
Head of Data & Information Management, HBF Health Ltd.

About HBF Health Ltd.

[HBF Health, Ltd.](#) is a not-for-profit health insurer headquartered in Perth, in the state of Western Australia. HBF was founded in 1941 as the Metropolitan Hospitals Benefit Fund of Western Australia, with the core purpose of providing affordable health services to Western Australians. Today, HBF is the leading insurer in Western Australia, with more than one million members and approximately 1,200 employees.

Data Environment

- Legacy data warehouse
- New data platform
- Strategic reporting and insights tool
- Cloud-based CRM