Customer Case Study: Texas Mutual Insurance

Alation Cloud Service Lets Data Teams Get Back to Business

- **Industry:** Insurance
- **Headquarters:** Austin, TX
- **Interesting Fact:** More than 75,000 Texas businesses entrust Texas Mutual to provide workers' compensation for their 1.5 million employees.

Bogged Down by Data Management

As the largest workers' compensation insurance company in Texas, Texas Mutual strives to make Texas safer for workers. "Every single day, we want workers to get back home safely; that's our mission," says Anthony Seraphim, Vice President of Data Governance at Texas Mutual. "But when there is an incident, we take care of them." To that end, Seraphim and his governance team use data to uncover customer insights and discover areas where they can improve worker safety.

When Seraphim joined Texas Mutual, his team's biggest challenge was enabling employees to leverage data as an asset. Like many companies, Texas Mutual was burdened by a complex set of data sources and internal, siloed data warehouses with little data governance.

The complex landscape prevented business users from accessing important data, created distrust in reporting, and prolonged analysis for critical business decisions. All this made it hard for teams to know how to use data effectively. "Decisions were often made on instinct rather than trusted data," recalls Seraphim. "Because of the lack of documentation about data and sources, it could take up to two months to create a report — and there was no way of knowing whether the data was even accurate."

Business Results

Supports Decision-Making: Delivery time for essential business dashboards is 80% quicker, leading to faster, more data-informed decisions

Focuses Priorities: With ACS, teams can concentrate on catalog adoption and user training instead of upkeep and maintenance

Speeds Upgrades: Processes that used to take a week now take 30 minutes

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Texas Mutual knew they wanted to migrate their on-premises data to the cloud as soon as possible. They anticipated adopting and accessing new capabilities on the cloud that would facilitate data-driven decision-making to improve claims outcomes and optimize premiums and reserves. Yet they faced the usual challenges inherent in a data cloud migration, from managing workloads to applying policies and security as they moved their data.

Alation Powers Snowflake Migration

Seraphim and his team knew that a cloud migration would enable them to curate trusted data, make that data more widely available, and provide transparency into how it can and should be used. They viewed the Snowflake Data Cloud on AWS as an ideal opportunity to change how they manage their data. And they recognized that the Alation Data Intelligence Platform was the best way to power an intelligent cloud migration, with its user-centric data catalog that made it easy to onramp stewards from across the business and include the company in every part of the data governance process.

"Alation was critical in determining the priorities and sequence at which data assets and key user groups were migrated to Snowflake's Data Cloud," says Seraphim. The fact that business units gained knowledge about where their data was coming from eased their move to Snowflake. The catalog provided a single place where they could see everything about their data, which helped them focus on critical data and put their data governance principles into action in the cloud.

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Alation

Combining data from 11 business domains and key processes such as actuarial, policy management, claims, and finance, Alation provides a one-stop shop for executives to access reliable data to make in-the-moment decisions about how best to deploy capital. The data catalog helps the company scale tribal knowledge and provides a user-friendly business glossary with consistent definitions.

Ready to Move Alation to the Cloud

Texas Mutual used the on-premises version of Alation for 18 months as they anticipated the launch of Alation Cloud Service (ACS). Seraphim knew that ACS would offer the same powerful data intelligence platform, but instead of managing an on-premises instance of Alation, he could leave the work to Alation.

Because their goal was to move to ACS, the company avoided customizing the data catalog, which then allowed them to use an out-of-box implementation. The on-premises Alation instance required internal support and IT coordination that took time and budget away from rolling out the data catalog and training and onboarding users. "Managing Alation in our data center was a distraction," explains Seraphim. "I wanted to move to a hosted solution so my team could focus on business activities rather than infrastructure activities."

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Seraphim began consulting with stakeholders within Texas Mutual in preparation for moving to the cloud-hosted version of Alation. "We gave ourselves a good six months to have conversations with legal, enterprise architecture, IT security, and vendor management to prepare for our first cloud services contract," says Seraphim. "We had a lot of questions, and Alation was always at the table with the right set of subject matter experts (SMEs) to answer them." By the end of the six months, Seraphim was ready to execute on the ACS migration plan.

Alation

Alation Cloud Service Migration: a "Nonevent"

When the time came, the migration from on-premises Alation to ACS was a "nonevent" according to Seraphim. "It took about 15 minutes to review the Alation project plan," he says. "It was out of the box, and we didn't have to change anything on it. The execution was half a day. We tested for a couple of days, and we went live. There were no showstoppers." In fact, it was nearly transparent to the rest of the company. Seraphim recalls, "When we announced we had gone live, people asked, 'Was that this weekend?'"

On Day 1, they uploaded their data dictionaries, which Seraphim credits with driving their initial high adoption. "The idea there was that if people go in and they don't find the information they're looking for, they're more likely to stop using the tool," he explains. They weren't concerned about the quality of data in the beginning and instead focused on entering the information, planning curation sessions to refine it later.

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Texas Mutual then provided several curation workshops and docujams focusing on topics such as integration with Tableau. These workshops generated excellent feedback and attendance along with driving adoption. "Our adoption metrics looked like a hockey stick after each workshop," says Seraphim. "And employees appreciated that the company offered hybrid workshops that allowed them to attend remotely."

The critical difference between the Alation Cloud Service and the Alation on-prem version is that the cloud service minimizes administration, maintenance, and resources to support the environment. Alation handles all the upgrades, backups, and IT infrastructure that Texas Mutual had to manage when Alation was deployed on premises. "With ACS, if there is an issue, we open a ticket and we go home and sleep," says Seraphim. "When we come in the next morning, it's either on its way to be resolved, or it's already resolved."

Letting Alation do the heavy lifting frees up time for Seraphim's team to concentrate on driving innovation with the data catalog. He notes that the most significant benefit was freeing his team from all the internal processes for upgrades. "We went from a week to 30 minutes, and it's not a distraction anymore," he says.

Alation and Snowflake: A Game-Changing Combination

When they implemented the Alation Data Intelligence Platform, Texas Mutual gained a one-stop shop for users to find information. A common set of definitions helps new hires and users across a broader audience. The solution reduced the delivery time of essential business dashboards by 80%, enabling senior executives to make daily decisions on how best to deploy critical capital. The catalog fostered transparency and trust by streamlining data policy creation and data classification with corporate-wide participation and adoption.

Another major benefit of the Alation data catalog is that it paved the way for a successful and seamless cloud migration. "The combination of Alation's active data governance and Snowflake's Data Cloud is game-changing," Seraphim remarks. "It provides a trusted view of our most important business metrics, allowing our executives to use data to take immediate and confident action. This results in reduced risk, improved financial health, and greater business agility."

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Migrating to ACS spurred adoption of the catalog. "Before, managing Alation on premises took up much of my time. Now, with Alation Cloud Service handling all the administrative and IT tasks, I can focus on curation events, gamification, and teaching more people how to use the platform," says Seraphim. These efforts also help improve data literacy across the organization. People now understand where to find data and how to use it.

Alation

"There was a clear benefit the organization experienced from Alation — which our chief actuary described as one of the most important tools last year that her team used because it helped coordinate and bring consistency," says Seraphim. When the company embarked on a hiring spree, Alation hastened the onboarding. "She could tell her new people, 'Go to Alation and find information,' and they found relevant, specific information. So the onboarding was very fast," he recalls. "We created consistency across their dashboards and models by putting all the business rules in Alation."

Safeguarding Data for the Future

In the future, Texas Mutual's data team will centrally manage and audit Snowflake data policies in Alation, ensuring that data is protected. "Alation and Snowflake's integration empowers Texas Mutual to be more data-driven and will improve our policy process," says Seraphim. "It's a critical component as we use data to develop better products and services for our customers and keep private data protected."

About Texas Mutual Insurance Company

Founded in 1991, Austin-based Texas Mutual is the leading provider of workers' compensation insurance in Texas. Approximately 75,000 state businesses rely on Texas Mutual's 1,000 employees to keep their 1.5 million-plus workers safe and on the job. Texas Mutual's mission is to provide a stable, competitive source of workers' compensation insurance for state employers, act as the insurer of last resort, and help prevent and minimize the consequences of on-the-job injuries and illnesses.

Data Environment

- Snowflake
- AWS
- SQL Server
- Db2
- Tableau
- Data Robot — AI/ML tool

Alation