



Any report. Any way. Right Now.™

Case Study

Once again, Jet Reports has made a dramatic difference.

For British pension administrator Suffolk Life, Jet Reports made a dramatic difference. As one of the largest companies in the world providing self-invested personal pensions, Suffolk Life has established over 14,000 pension plan accounts, managing gross assets of over £3 billion.

Access equals control equals continual improvement

Ongoing improvement at every level is a cornerstone of Suffolk Life's business plan. Recently, Jet Reports has helped promote that goal, by providing pension administrators the tools to access and act on vital data—data that in the past was only available to IT staff and the highest levels of executive management, through outsourced specialized developers, at significant expense.

According to Neil Clayton, Solutions Architect for Suffolk Life, "Using Jet Reports has allowed vital information to be accessible to a new level of management. Now our pension administrators have control over data that was difficult to make available to them before. Being able to see and understand that information gives them flexibility and helps in virtually every aspect of their job, including planning, performance assessment, and decision-making. They can build and see their KPIs themselves."

Whether it's tracking changes in legislation, optimizing business growth through new clients, or developing new products and services, Jet Reports facilitates the data accessibility that fosters Suffolk Life's goal of continual improvement.

From 12 hours to 10 seconds

Jet Reports also helps Suffolk Life spur efficiency with a diverse array of investment choices, Suffolk Life has an ongoing, critical need for data reconciliation.

"By using Jet Reports out of Navision we're able to do an extraction and reconciliation process in a minute or two—sometimes as little as 10 seconds," Clayton says.

SUFFOLKLIFE
THE INTELLIGENT APPROACH



"Jet Reports allows vital data to be accessible to a new level of management. Being able to see and understand that information gives our pension administrators control over the data and helps in virtually every aspect of their job."

—Neil Clayton, Solutions Architect,
Suffolk Life

Jet Reports

10450 SW Nimbus Ave, Suite B | Portland, OR | 97223 USA
1-503-608-3603 | www.jetreports.com



“Knowledge is power. But finding the power to obtain the right knowledge can be just as critical.”

Continued...

Neil Clayton explains, “One of our key business systems is preparing what we call Corporate Action Reports. Corporate actions are events that happen on stocks and shares—dividend payouts, share splits and such. It’s imperative that throughout all of our transaction reporting, the numbers and event history match up when we send out a client’s annual statement.”

However, Suffolk Life found such balancing to be both complex and time-consuming. For the type of reconciliation needed in Corporate Action Reports, manual checking was the norm—requiring up to 12 hours per plan.

“We’re able to use the Jet Reports extraction from Navision, plus the downloaded corporate actions published by the London Stock Exchange, and then do a reconciliation between the two—and thanks to Jet Reports, all of that happens in Excel, which simplifies everything.”

With up to 1,500 annual plan statements going out a month, Clayton admits, “We could not do these types of reports without Jet.”

Control over information

Summing up the impact Jet Reports has had on Suffolk Life’s ability to access, control and act on the information that drives their business, Clayton says, “Jet Reports gives us many advantages. We now have tools for producing reports and streamlining key processes, in-house, that allow us to share information across a broad range of internal departments. The cost and time efficiencies are significant—development times are very short to produce quite a sophisticated report.”

“To be able to have the level of abstraction that Jet Reports offers us, and to have it delivered in an Excel spreadsheet format which everyone understands and can use, is crucial to our success.”

“Jet Reports allows vital data to be accessible to a new level of management. Being able to see and understand that information gives our pension administrators control over the data and helps in virtually every aspect of their job.”



“We could not do these types of reports without Jet.”

“Using Jet Reports for reconciliation on our Corporate Action Reports, we’re able to go from a process that took up to a day and a half with manual checking, to an automated operation of as little as 10 seconds.”

--Neil Clayton, Solutions Architect,
Suffolk Life

▶ www.jetreports.com



Jet Reports

10450 SW Nimbus Ave, Suite B | Portland, OR | 97223 USA
1-503-608-3603 | www.jetreports.com