



| SLA Data Analytics 2.0 – Data Warehouse & Ad-hoc Reporting | |
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| Project Plan Updated | June 13, 2021 |
| Target Completion Date: | November 30, 2021 |
| Owner: | Vani Ganti |
| Support Personnel (Approved Signers) | <ul style="list-style-type: none"> • Mike Caturegli • Mitchell Mercurio |
| Scope: | <p>This project will result in allowing the SLA's vast amount of data to be consolidated, analyzed, and reported at different aggregate levels and by more individuals within and outside of the organization. This project will include:</p> <ul style="list-style-type: none"> • Create a new Analytics Portal • External facing- Making the Analytics available on the Website to external users on Market Analysis. <ul style="list-style-type: none"> ▪ Top Carriers by Ultimate Parent ▪ Top Brokers by Group ▪ California Premium by Insurer ▪ Premium by Policy Type ▪ NAICS Report • Internal - <ul style="list-style-type: none"> ▪ Broker Compliance Overview ▪ Animated Coverage Map ▪ Improvements to existing Analytics |
| Significant Vendors: | Yes. SLA staff and Kikoda LLC. |
| Budget: | \$100,000 |
| What Line Item Will Project Budget Come From: | 1400 – Fixed Assets |
| Benchmark: | <p>The main benchmark for this project is to enhance the existing Analytics Portal with relevant data for analysis, mining, and reporting, and to make this analysis and reporting accessible to more individuals in the organization as well as a sub-set to the general public. The benefits of the DW include:</p> <ul style="list-style-type: none"> • Greater access to the SLA's data, transformed in multiple ways to quickly identify trends and patterns through data mining and visualizations • Ability for non-IT individuals to easily access and work with the data, including the ability to run ad-hoc reports • Allowing the SLA to better inform the membership of enhanced business intelligence within the industry • Improved data quality and consistency within the SLA's systems through research and analysis projects of the aggregated data |
| Review Dates: | <ul style="list-style-type: none"> • 2/1/2021 – Launched Analytics Portal |



| Benchmark | Dependency | Status | Start | Finish |
|------------------------------------|--------------------------|---------------|--------------------|---------------|
| Analytics Portal launched | SLA IT/Kikoda | Complete | Dec. 1, 2020 | Feb. 6, 2021 |
| Comments: | | | | |
| Benchmark | Dependency | Status | Start | Finish |
| Bug Fixes and Improvements | SLA IT/Kikoda | Continuous | Dec. 1, 2020 | Nov. 30, 2021 |
| Comments: | | | | |
| Benchmark | Dependency | Status | Start | Finish |
| Comments: | | | | |
| Accounting: | Date Paid | Funds Paid To | Amount Paid | |
| | 2/9/2021 Dec-Invoice | Kikoda | \$ 7,065.00 | |
| | 3/12/2021 Jan-Invoice | Kikoda | \$ 11,342.50 | |
| | 3/26/21 Feb-Invoice | Kikoda | \$ 6,700.00 | |
| | 5/7/2021 Mar-Invoice | Kikoda | \$ 5,692.50 | |
| | 6/7/2021 – April Invoice | Kikoda | \$ 12,055.00 | |
| | May Invoice | Kikoda | \$ 11,805.00 | |
| | | | | |
| Total Paid on this Project: | | | \$54,660.00 | |

| Budget Ledger: | Date | Remaining Budget | Invoiced Amount | Estimate to Complete | Variance | Notes |
|--------------------------|--------------|------------------|-----------------|----------------------|----------|-------|
| | 12/1/2020 | \$100,000.00 | \$ - | \$ - | \$ - | |
| 2/9/2021 | \$100,000.00 | \$7,065.00 | \$ 92,935.00 | | | |
| 3/12/2021 | \$ 92,935.00 | \$11,342.50 | \$ 81,592.50 | | | |
| 3/26/2021 | \$ 81,592.50 | \$6,700.00 | \$ 74,892.50 | | | |
| 5/7/2021 | \$ 74,892.50 | \$5,692.50 | \$ 69,200.00 | | | |
| 6/7/2021 | \$ 69,200.00 | \$12,055.00 | \$ 57,145.00 | | | |
| | \$ 57,145.00 | \$11,805.00 | \$ 45,340.00 | | | |
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| General Comments: | | | | | | |
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