



## National Life Group (A), Montpelier, Vermont

“KnowledgeWave Training has been a valuable partner in our company-wide financial system upgrade – from implementation and training, to the development of essential reporting tools needed for the success of our business goals.”

Claudia H. Brousseau, EA  
National Life Group  
Director – Tax Accounting

**# of Employees:** 850

**Type of Business:** Financial Services

### **Background:**

Headquartered in Montpelier, VT, National Life Group is a family of financial service companies operating throughout the United States. Companies in the Group offer a comprehensive portfolio of life insurance, annuity and equity products to help individuals, families and businesses meet their financial goals.

In 2006 National Life decided to upgrade to a new financial system and develop a new reporting structure. The system that had been in place for over a decade was radically outdated and unable to store the growing amount of information required. National Life needed a financial system with a much larger capacity and the ability to do reporting with more modern technology tools. In order to perform a successful upgrade there were many criteria that had to be met, with deadlines beginning in July 2006.

### **Solution:**

National Life Group partnered with KnowledgeWave Training to help them achieve their goals and implement a reporting structure for the new financial system. The main objectives for this structure were to make the required data readily accessible, and to do so as quickly as possible.

KnowledgeWave reviewed the new financial system, the Lawson Financial System, and determined that Crystal Reports and Microsoft’s SQL Structured Query Language could be used to meet National Life’s goals. Lawson Financial System is an enterprise software solution, which is designed to serve the specialized needs of service industries, like that of National Life Group. The Lawson product has an enterprise component - the “Lawson Business Intelligence” that relies on Crystal Reports.

Crystal Reports allows users to access, format and deliver data. Using Crystal Reports, KnowledgeWave developed hundreds of the general ledger and payroll reports, which were requested by National Life.

KnowledgeWave consultants utilized SQL to optimize data access. They used Microsoft SQL technologies to provide storage and indexing optimization in order to realize performance benefits. These optimizations manifested themselves in reduced data access times and greater report reliability.

**Results:**

*National Life Group's new financial system went live the week of October 30, 2006.*

KnowledgeWave successfully utilized Microsoft SQL and Crystal Reports to gain access to the required data, necessary for the success of the upgrade. The financial system is now flexible and based on new technology, and data is accessible and well-organized, helping to meet their needs quickly and more efficiently.

In addition, National Life Group and KnowledgeWave Training developed a training program aimed to educate employees about the new system environment. KnowledgeWave has begun to train staff in developing reports and data access techniques, so that they are able to retrieve the data needed from the new Lawson system.

Founded in 1990 and headquartered in South Burlington, Vermont, KnowledgeWave Training specializes in education and training, as well as custom database and software development. KnowledgeWave, Inc. is Vermont's only Microsoft® Certified Learning Partner, a Citrix® Authorized Learning Center, and a Novell® Authorized Education Center and an authorized Cisco® Learning Solutions Partner. KnowledgeWave offers a full-range of authorized Microsoft®, Citrix®, Novell®, and CompTIA courses, plus custom-designed corporate curriculum, by qualified instructors, who rise above industry guidelines. State-of-the-art training and education centers are located in South Burlington, Montpelier and Brattleboro, Vermont, and on-site training at client facilities is available, as well.