CASE STUDY

From Manual Reporting to Strategic Visibility

How Granwest Insurance partnered with TAC_4 Solutions to rebuild its finance foundation, use automation to reduce manual work, and give leadership more timely insight for strategic decisions.

Featuring insights from Kristin K., CPA, Controller

Granwest Insurance has long had a strong finance team doing important work, but the tools and processes supporting that work became very manual over time. This is common in the insurance industry, where systems have been in place for decades, and teams have had to work around the data with spreadsheets and manual data manipulation to maintain compliance, support planning, and inform strategic decisions.

In Granwest's case, the financial system had been in place for more than 20 years. Financial statements were still being built in Excel, with numbers hand-entered and hard-coded into files that had to be updated, reviewed, and reconciled before finance could use them.

The work was getting done, but much of it lived in spreadsheets, numerous linked files, manual updates, and the memory of the people who knew where everything was.

Granwest Controller Kristin K., CPA, recognized the problem almost immediately upon her arrival to Granwest. The company's finance work had outgrown the tools and processes supporting it.

When asked how long it took for her to see issues in the current processes, Kristin did not hesitate.

> *"I noticed my first day on the job. It was that quick."*

Supporting schedules relied on linked files, and quarter-end reporting required careful updates across multiple workbooks. Kristin described it as "this web of linking."

Sometimes the work was as basic as chasing down an error in a linked file. Other times, a broken reference or confusing spreadsheet link could send the team back through the data, searching for the cell causing the issue. The finance team was doing everything it could to keep the work on track, but the way the data was structured forced too much time into finding, tying out, and researching the inputs before they could get to the answer, which made it difficult for the team to improve the process or use the numbers in a more strategic way.

Spreadsheets were not the only problem; there was a disconnect with where the details lived. A number might start in one file, roll into another, get checked somewhere else, and then feed into a report leadership needed. The impact was most obvious in reporting budget versus actuals and management reporting. The team could access the information, but the process took too long to support how leadership needed to use it. The information was often better suited for explaining what had already happened than helping the business make timely decisions.

> *"By the time we tracked down what was needed, the information was pretty much stale."*

Kristin knew Granwest needed a better way to turn daily finance work into timely, useful information the business could use strategically. Seeing the need was only the beginning. She still had to make the case.

Kristin spent time preparing a presentation that laid out the work as a finance transformation, not an isolated system project. It organized the story around four areas: processes, people, data, and technology. It showed what the team was dealing with, including manual reporting, an outdated chart of accounts, limited reporting tools, and significant time spent pulling information together by hand. It also showed what Granwest could gain with the right foundation: an efficient close, better expense visibility, stronger budget comparisons, more timely reporting, and a finance team becoming an integral partner in supporting the strategic goals of the business.

The relationship with TAC_4 had started before the formal project path was set. At IASA, Kristin met Alan, TAC_4's President and CEO, and reconnected with Kristine, TAC_4's Vice President of Sales, who she had met years before on another implementation. Those conversations gave her a way to move from seeing the problem to shaping a case the company could evaluate.

That trust gave Granwest a partner who could guide more than a selecting a vendor. TAC_4 could organize decisions, challenge assumptions, and stay close when the work moved from planning into the more difficult job of making the new system function inside daily finance operations. TAC_4 became an extension of the Granwest team.

Alan had already begun working with Kristin on designing the business case before a formal project was in place, which gave her an early view into how TAC_4 approached a complex insurance system transformation. Alan supported her on the presentation and cost-benefit analysis, turning the need for a new system into a strong business case Granwest could evaluate through strategy, cost, and long-term value.

For Kristin, that early support was especially meaningful because it came before the project was formalized.

> *"Not everyone would have taken the time to help me out."*

Before a contract was even discussed, TAC_4 was already discussing the strategic value of the project with Kristin. TAC_4 connected the finance problem to what leadership needed to understand: better automation, more timely reporting, stronger decision-making, and a finance function that could support where Granwest needed to go.

> *"TAC_4 didn't just care about earning our business. They cared about whether we were successful."*

Why Granwest Brought in TAC_4

Kristin did not bring leadership a complaint. She brought forward a clear business reason to act. She was not asking Granwest to swap one tool for another or complete a "lift and shift." The goal was better reporting, stronger analytics, future automation, and eventually AI integration that would only work if the financial numbers could be accessed, trusted, and structured well enough to support that goal. The intent was not just to make the process faster. The entire strategy was to give the entire organization better, timely information on which to base decisions.

> *"You can't just go from the 1990s right to using AI to get work done. You have to start somewhere in the middle."*

Granwest was not only trying to make finance faster; they were trying to change the kind of work the finance team could do. Less time spent chasing numbers meant more time understanding results, supporting strategy, and seeing the impact of their work on the business. For the team, that meant more engaging work and a clearer connection between the numbers they handled every day and the decisions those numbers helped inform.

> *"We wanted to change how the team worked and make the work more meaningful." ..... "The idea of something better was exciting for everyone."*

By the time Granwest was ready to move, Kristin knew the project needed more than implementation support. The project would affect how Granwest structured its chart of accounts, handled allocations, supported statutory reporting, handled reinsurance and investments, planned integrations, made vendor decisions, reported to executives, and all of this needed to happen simultaneously while doing their day-to-day work.

Kristin was not looking for a generic project plan. She needed people who had deep expertise in managing and supporting projects of this magnitude. Projects like these may happen only once every 20 to 30 years inside an insurance organization. Most of the team had never been through the hard work of a large-scale system transformation. Granwest needed a partner who would know where the hard parts would show up and how to navigate them.

Kristin knew there was significant project readiness work that needed to be done prior to researching vendors. The organization had to prepare for a project that would be difficult, time-consuming, and full of quick decisions. She also knew she needed more help than the vendor or the vendor's implementation partner could provide. She needed an advocate for their business.

> *"If we wanted to do it and do it right, we needed help from someone who has already done it dozens of times."*

Granwest's internal IT team already had major systems work in front of them, including policy administration and other business priorities. Finance transformation needed its own focus, and Kristin wanted a partner who had experience partnering with insurance companies in supporting a successful transformation.

Kristin also knew Granwest did not need to work through every insurance finance design decision alone. She was looking for insurance system and process experts who had already made these decisions numerous times before and:

- Knew how to think through the chart of accounts and allocations from a strategic perspective
- Understood the impacts to regulatory and management reporting

- Knew the way reinsurance detail needed to be handled; and
- New how system design would shape future reporting and organizational strategy

As she put it, “Someone else has already solved a chart of accounts for an insurance company before me. I need that expertise.”

Granwest could have selected a large-scale international consulting firm, but Kristin was looking for a different kind of fit. She needed insurance finance knowledge and hands-on project experience, but she also wanted a specialized partner close enough to the work to understand the decisions needed, how those decisions impacted other teams, a partner who would stay engaged through the hard parts and carry the team from idea to execution.

She wanted the A team: experienced people who could roll up their sleeves, get into the details, and drive the project toward a successful implementation. She did not want senior people in the sales conversations, and a junior team assigned to the project after the work began. She wanted a true partner that would stay close to the project from start to finish. She wanted TAC_4.

> *“TAC_4 has successful experience doing this, and they know the industry. You can’t ask for better than that.”*

The First Value Was Knowing Where to Start

Once TAC_4 became involved, the work started to unfold. Granwest had the need, Kristin had the vision, and leadership had approved the direction. The next challenge was turning that vision into a project the team could execute, with the right people involved, the right questions answered, and the right decisions in front of them before vendor conversations moved too far.

Project readiness gave Granwest a disciplined way to slow the work down in the places where rushing creates risk. Before the team got too far into RFPs, demos, features, and timelines, TAC_4 guided Granwest through the current state of the business: how the existing system worked, where data moved, which processes depended on manual effort, what reports leadership needed, and how the new system should be organized to support the future.

The early work gave Granwest the ability to compare vendors against the business requirements needed to move the project toward the documented outcomes, not just the features that looked strongest in a demo. It also pushed the team to think through ownership, governance, project management, data needs, reporting priorities, and the resources required to support the work.

Kristin described the early impact this way: “TAC_4 gave Granwest the organization around how to go about the whole process,” which was exactly what the team needed

The structure came from Projenomics®, TAC_4’s proprietary framework for complex insurance system transformation projects. Granwest needed that discipline, but the project still had to fit the size, pace, budget, and decision style of the organization. TAC_4 applied the right level of structure at the right time, so vendor conversations were grounded in Granwest’s business needs, and the implementation had a stronger start.

Crucial Decisions Before Project Start

The early readiness work carried a lot of weight because the decisions made before the start of the project would shape the success of the system after go-live. Dee and Donna, seasoned TAC_4 consultants who worked closely on the implementation, saw that responsibility clearly. Their role was not simply to keep the project moving. It was to guide Granwest through which decisions could move quickly, which needed more time and attention, and where a short-term answer could create a long-term problem.

The requirements TAC_4 defined with Granwest during vendor selection became a reference point once implementation began. They shaped later design conversations: how expenses should move, what reports the business needed, how statutory reporting had to be supported, what management wanted to see, and which integrations would be necessary.

Once the vendor was selected, Granwest had a clearer way to evaluate whether the proposed design supported the business needs already identified. The team was not starting from a generic software path.

One of TAC_4's most important roles was separating vendor preference from business need. Since Dee and Donna had worked through many similar implementations before, they knew a software vendor may describe something as best practice when it's really the fastest or most familiar way for that vendor to implement the system.

TAC_4 pushed back when vendor recommendations did not align with statutory reporting, management reporting, integrations, or Granwest's specific business requirements. In some cases, the needed direction meant moving away from the vendor's standard process because TAC_4 understood insurance reporting requirements that called for a different approach. Over time, those conversations gave the implementation partner a clearer view into TAC_4's insurance finance perspective, creating a stronger working partnership around Granwest's needs.

Slowing Down the Right Decisions

Many software implementations are built around reaching the target end date, then moving unresolved items to support after the system is live. TAC_4 showed Granwest where that approach was reasonable and where it could create long-term problems the support team could not easily untangle later.

The commissions process became one of the clearest Granwest examples. Agent payments needed to be accurate, timely, and supported by the right level of detail, which meant the team had to think beyond whether the system could technically process a payment. TAC_4 led Granwest through the controls, integrations, and commission statement details that would affect how agents understood what they were being paid. When gaps showed up in the software or in the proposed process, TAC_4 worked closely with the implementation partner and technical team to make sure the solution supported Granwest's needs after go-live, not just what could be completed quickly before the targeted completion date.

During implementation, Dee described TAC_4's role as guiding Granwest through the pressure to move quickly while slowing down on decisions that would affect reporting, controls, and daily finance work after go-live. TAC_4 used its Projenomics® decision form to turn complex project conversations into decisions the team could revisit later. The form created clarity around the exact decision, the justification, who would be affected, and what needed to be communicated next.

Donna described the risk plainly: a team can agree on one direction, learn new information later, and then struggle to remember why the original decision was made. The decision form gave Granwest a record to return to when questions came back up, keeping important choices from becoming vague memories or decisions reopened without context later in the project. The decision form also ensures that impacted parties are made aware of the decision, creating buy-in and increasing project morale across stakeholders.

This guided structure gave Granwest steadier support through the pressure of implementation. The team still had hard decisions to make, but they were not making them alone. TAC_4 brought an experienced voice into the room when conversations became complicated, repetitive, or urgent, keeping Granwest grounded in the reasoning behind prior decisions while the project continued moving forward.

The Hardest Work Came After Go-Live

The hardest part of the project came after go-live. Granwest had to run live finance work in the new system for the first time. The team was processing invoices, running checks, closing the month, and answering reporting questions while still learning how the new process worked.

Go-live is not the finish line. It is the point where the system starts handling real transactions, reporting cycles, and users. For Granwest, the work shifted from design and testing into daily finance operations. Questions that had seemed theoretical during implementation now had to be answered inside real workflows: how transactions moved, how details were tagged, how reports were reviewed, and how the team would keep the month-end close on track while adjusting to the new system. TAC_4 was there through every step.

TAC_4 also prepared Granwest for the practical side of using the system. As testing gave the team hands-on time in the new environment, TAC_4 captured the details that would be important after go-live: where processes changed, which steps needed clearer documentation, what training support would prepare the team, and which lower-priority items could be addressed once the system was stable.

A new system creates new routines. TAC_4 turned those routines into practical guidance the finance team could return to as the new processes became more familiar.

TAC_4 guided Granwest through that work, answered questions, worked through issues, tested solutions, and rolled up their sleeves doing the work to keep the finance process moving while the new system became part of daily operations. Granwest had a true partner through the practical challenges of transformation, not just during planning and implementation.

From Manual to Measurable

Positive results started showing up where finance teams feel change first: month-end. Work that had lived outside the ledger moved into the automated process of the new finance system, giving Granwest more structure and visibility across premiums, losses, reinsurance information, investment details, allocations, and supporting data. Instead of seeing a summarized number in the ledger and hunting through spreadsheets to understand what was behind it, the team could access details inside the system with drill-down.

Granwest was also able to bring more useful information into the new finance system than expected. Before the transformation, much of the month-end process came together through detailed spreadsheet review, manual tie-outs, and supporting files outside the system. After implementation, more of that information could be captured, reviewed, connected, and refreshed within the system.

Kristin described the shift through the outcomes her team could see in the work:

> *"We have significantly reduced manual work. By day one of month-end, direct business is already reconciled. The team has a much stronger understanding of what they are looking at, and the shift in how we spend our time is immediate."*

The benefits showed up in several ways: time back in the close, less work buried in spreadsheets, direct business reconciled on day one, reinsurance detail connected in the system, and reporting that could be refreshed instead of rebuilt. The close timeline was one of the most obvious immediate wins. Before the transformation, Kristin had already improved financial statement production to roughly 15 to 20 business days. After implementation, the goal became stronger: net income before taxes by business day 10. The improved close timeline gave Granwest a path to deliver usable financial information up to two weeks sooner.

Finance still needs to review, reconcile, and explain the numbers. The work doesn't go away, but the difference is where the team can spend its time. Instead of building the information by hand with data gymnastics, the team can spend more time analyzing results, supporting strategy, and helping leadership understand what the numbers mean to make timely business decisions.

Real Answers, Not Just Final Numbers

The reporting change was not just about producing cleaner output. It changed what finance could show the board and executive team.

Before the transformation, some of the information leaders needed was available in pieces. The team could get to the answer, but too much time was spent pulling and reconciling information before the full picture came together. By then, the information was stale, which limited its use for planning.

Finance started moving from explaining what had already happened to helping leaders make decisions in real time.

Kristin described the new visibility this way.

> *"The ability to drill all the way through to the transaction is amazing. That level of detail and analytics is something we've never had before. Having all of that information more readily available, digestible, and timely has been crucial."*

Finance can now answer questions with supporting data. If a number looks different than expected, the team can easily trace it. If leadership wants to understand what is driving a result, finance can access the detail behind it. If reporting needs to show a broader view of the business, including the effect of reinsurance, finance has a path to the information needed to explain it.

The Team Started Seeing the Business Behind the Numbers

Kristin's original case for the project included the team, not just the technology. The finance team needed better tools, but Kristin also wanted the work itself to help people grow.

The new process gave the team a clearer view of how the pieces fit together. TAC_4 guided the team through questions as they came up in daily work, so the team could understand not only what needed to happen in the system, but how that work impacted reporting and business visibility.

> *"The team's knowledge and growth have grown exponentially."*

Kristin's team did the hard work of learning the system and owning the process, and TAC_4 stayed beside them as the questions moved from training material to live finance work. When something did not behave the way the team expected, TAC_4 worked through the issue with the team, connected it back to the reporting need, and kept the team on track. The team was not just learning where to click or how to complete a task. They were learning the impact their work had on the full finance picture.

Kristin also saw the project changing the way the team worked together.

> *"I feel like it's building a much stronger team."*

Finance Could Move Beyond Manual Reporting

Kristin wanted finance to become a stronger partner to management. Before the project, planning and budget reporting took significant effort. Budget versus actual reporting could take months to prepare because the information was spread across cost centers, spreadsheets, and supporting files that were difficult to roll together with confidence.

The new finance foundation created room for the next stage of the work: a stronger financial planning and analysis function. With more activity captured in the system, less reporting work trapped in manual files, and more detail available at the source, Granwest could begin shifting finance effort toward planning, analysis, and business support.

> *"Now, we have this capacity and this opportunity to really stand up a true FP&A function."*

The longer-term value is what that capacity makes possible. Granwest is no longer just working hard to get information assembled, checked, and delivered. The finance team has more room to interpret what the numbers mean, support planning conversations, and help management understand what is changing in the business while the information is still useful.

Her advice to other insurance finance leaders is direct.

> *"It's worth it. Make sure you have the right resources so that you set yourself up for success."*

A Better Finance Foundation is a Leadership Decision

Granwest did not treat finance transformation as a simple system replacement. The company used the project to reduce manual work, help the finance team grow, and give leaders more timely information for strategic decisions.

The story is specific to Granwest, but the pattern will feel familiar to many insurance executives. Capable finance teams can spend years working inside processes that still get the job done, even while those same processes impede reporting, spread data across too many places, and leave leaders working from partial information when they need a full view of the business.

Kristin saw the decision clearly. Granwest could keep working around the same limitations, or it could rebuild the finance foundation. The work required time, patience, and practical problem solving, but it created something larger than a cleaner close process. It gave the finance team a stronger way to understand the business, gave leadership information sooner, and gave the organization a better path toward automation, planning, and strategic visibility.

Looking back, Kristin said she is glad TAC_4 was part of it.

> *"It's been a journey, but I'm so glad that we had you guys with us."*

TAC_4 Solutions supports insurance organizations through complex system transformation, from planning and vendor selection through implementation and stabilization.

Explore Projenomics®