

Enhancing Business Insights through Self-Service Visualization



Location

USA



Client

A large financial services organization



Solution

Xylity Implemented Tableau to provide business users across departments with self-service access to data visualizations and dashboards



Result

Increased user adoption, improved efficiency, and expanded data access across the organization

About the Client

The client is a leading global financial services firm that has been in business for over 50 years. With offices worldwide, the company serves a diverse international clientele including individuals, corporations, and institutions. As assets under management grew to over \$500 billion, the scale and geographic distribution of operations presented data sharing challenges.

Each department and regional office leveraged separate systems for tracking key metrics and outcomes. Silos of information inhibited benchmarking and strategic decision making. The demands of regulators and clients required consistent reporting across business lines. Seeking to advance its analytical capabilities, the VP of Marketing Research recognized the need for streamlined data access and insights. The team managed reporting but struggled with manual processes that failed to keep pace with expanding analytical demands.

Client's Goal

The client's leadership team envisioned:

Centralized access to performance metrics and KPIs for all business lines and regional divisions

Self-service analytics empowering managers to obtain tailored insights independently

Personalized views of information reflecting unique user needs

Standardized reporting supporting regulatory obligations and transparency

Actionable guidance delivered through an intuitive interface optimized for mobile usage



The Challenge

The key challenges included:

Silos of data residing in disconnected databases and applications

Manual reporting processes that were labor-intensive and prone to errors

Inability to segment and correlate insights at both a macro and micro level view

Limited metrics available to non-technical functions such as sales and service teams

Bottlenecks creating delays in sharing time-critical analyses and decisions

Lack of scalability as analytical needs grew more complex with the business

Dated interface hindering user-friendliness and adoption rates firm-wide

Overcoming these hurdles required an integrated visualization platform promoting self-service usage across the diverse organization.

Our Solution

Xylity's Tableau solution provided the necessary tools to realize the client's vision. Tableau Server hosted a centralized library of analytical content including dashboards, stories, reports and purpose-built applications. The browser-based interface offered intuitive consumption on any device.

The platform empowered self-service usage through interactive exploration and discovery. Filters, calculations and annotations supported direct engagement and note-taking. Saved views tailored experiences to the unique analysis needs of individual user personas. Permissions ensured regulated access to relevant subsets of data.

Automated data connections to disparate systems delivered up-to-date insights. Custom SQL queries accessed granular detail when needed. Template workbooks streamlined content authoring. Dashboards bundled related visuals and narratives into comprehensive overviews of KPIs.

Advanced modeling capabilities like SQL joins and Union queries correlated metrics across silos. Custom apps integrated predictive algorithms and geospatial analysis. Hyper and parameter controls facilitated guided, segmented analysis. Custom stories brought touchscreen usability to roadshows and presentations.

Implementation Process

With Tableau selected, the project team developed an implementation plan focusing on three key phases. Phase 1 involved thorough discovery of existing processes, systems and user personas. Over 50 stakeholder interviews provided important insights.

During Phase 2, the Tableau platform was configured. Data from multiple sources including CRM, financial and HR systems was integrated using ETL tools. Custom data models organized information into subject areas tailored to user needs. Dashboards, stories and centralized reports were then created addressing strategic, operational and compliance related metrics.

A pilot program involved representative users testing initial deliverables. Their feedback further refined the experience design. With usability and performance validated, Phase 3 prioritized change management.

Tableau training customized learning paths for various profile types - from analysts to executives. Self-service guides and an internal community fostered peer-to-peer learning. The go-live strategy involved phased release waves to monitor adoption and refinement needs.

A governance framework sets permissions and content policies. Methods for content ideation and prioritization aligned efforts with strategic objectives. Custom app development supported complex analytic workflows. Metrics defined success and iterated roadmaps.



An extension SDK enabled bespoke visual creations. A robust API facilitated 3rd party applications. Server management and governance established proper change controls. Custom connectors consumed additional unstructured datasets as needs evolved.

Results

Usability and personalization drove greater-than-expected engagement across functions. Standardized, real-time information flows united previously fragmented operations. Customized experiences delivered relevance at both macro and micro levels, enabling previously unforeseen optimizations. Performance transparency accelerated continuous improvement initiatives. Self-service freed 75% of manual labor for more strategic application. Demonstrated successes deepened executive support and technology investments.

Tech Stack Used

Tableau Server - Hosted the centralized visualization platform including dashboards, stories, reports and custom applications. Provided real-time exploration and insights delivery.

Tableau Desktop - Enabled creation of interactive visualizations, dashboards and other analytical content.

Data Connectors - Integrated diverse data sources including human resources, financial, CRM and operational systems through ODBC, SSAS and custom APIs.

Informatica - Facilitated automated data management and ETL processes to refresh insights in real-time.

Amazon Web Services - Provided scalable cloud infrastructure to host and manage the Tableau platform.

Looker - Supported audience segmentation, usage analytics and reporting on content performance.

Microsoft Azure - Hosted geospatial mapping, advanced modeling and AI workloads integrated within custom applications.

Extension SDK - Allowed developing specialized visualizations, workflows and applications to address emerging requirements.

RESTful APIs - Exposed platform functionality for integration with other systems and third-party tools.

Conclusion

By implementing Tableau, users across lines of business now independently leverage insights to their unique advantage. Enhanced decision-making transformed business performance. Self-service visualization delivery fostered unexpected collaboration, deepening understanding and opportunities company-wide. Data-driven leadership reinforced, the solution proved widely scalable and cost-efficient.

Siloed data prevents your true potential. Unite teams with interactive, governed analytics on Tableau - get in touch with Xylity to spark your organization's transformation.

