



CASE STUDIES: USING VISUAL ANALYTICS TO DRIVE BUSINESS VALUE

Dashboards are about much more than just producing reports and graphs. Fusion Alliance sees dashboards as the way to interrogate your data, enabling users to interact with visualizations in a way that provides actionable insights.

When our clients ask for assistance with dashboards, we take a user-story-focused, iterative approach to analytics. Using this approach helps develop dashboards that are relevant to driving business decisions.

Customer Success Story #1:
Dashboards Help Financial Institution Decrease Credit Quality Risk

Challenge: An established financial institution wanted to assess its overall data management maturity as it related to several dimensions of strategic data management, including data governance and analytics. There was a need for better insights into credit quality when it came to loan defaults and loan initiation.

- The bank sought to improve its ability to interrogate data in respect to credit quality.
- The bank wanted to better understand factors that contribute to loan delinquency.

Solution: Fusion engaged in an initiative to understand the current state of the bank’s data management maturity, the targeted future state and ultimately the creation of a detailed roadmap to achieve the future state. One workstream that emerged from this strategic effort was moving from a reporting paradigm to one of self-service business intelligence.

- To assess credit quality, Fusion partnered with the client to review existing reporting, understand information needs, define analytics user stories and create a self-service solution that would replace the current large number of reports.
- Fusion developed an end-to-end analytics solution, pulling data from source into a semantic model designed specifically for quality use cases.
- The model was exposed to end users via Tableau, and an initial set of dashboards was created as a starting point. It was deployed in Tableau Server, and end users were trained how to create reports.
- Users got a daily “headlines” view of the data to show material changes from the previous day.

Results: By partnering at the strategic level first, Fusion ensured the initiative was valuable and fell within the context of the overall strategy, moving the needle on the bank’s maturity roadmap by enabling self-service and reducing the reliance on traditional reporting.

- New dashboards allowed the customer to interact and interrogate relevant data to better understand trending and factors that most influence credit quality.
- The solution eliminates the need to produce multiple reports, creating substantial cost and time savings, while improving the customer’s insights into their credit quality management.
- The client reported an ROI of 1,054% over a three-year period.

Customer Success Story #2:
Dashboards Provide Pharmaceutical with Insights into Website Usage and Customer Behaviors

Challenge: A leading pharmaceutical company wanted to provide its marketing team with enhanced analytics capabilities for the company’s branded websites. This would help

provide valuable insights about customer behaviors, allowing them to continuously improve website design.

- The customer was eager to demonstrate the value of a pilot Google Analytics program while also improving its capability to analyze the data being captured.
- The company wanted to leverage Tableau to produce dashboards and ultimately learn how to produce dashboards themselves.

Solution: Fusion partnered with the customer to understand its primary user stories, advise how to maximize the value of the Google Analytics setup and create dashboards for a specific brand.

- Early in the process, Fusion helped the customer understand Tableau licensing and Tableau Server setup. Fusion advised the client about Google Tag Manager setup and filtering so it could focus on its targeted demographic.
- The Fusion team created dashboards in Tableau, working iteratively with the client to provide the most valuable cross-filtering and grouping of visualizations to optimize the effectiveness of data interrogation.
- Dashboards were transferred to the client for deployment on Tableau Server.
- Fusion trained the client how to create dashboards on their own.

Results: Fusion was able to create high-value dashboards that provided the analytics to make critical design enhancements to their website.

- Marketing gained the enhanced analytics capabilities it needed.
- Because of new insights into site usage, marketing now has the visibility into user behavior to direct changes that improve the customer experience.



- The solution was provided to client under budget and ahead of the estimated project duration time, which reinforced an already strong partnership.

Customer Success Story #3:
Leading Auto Lender Uses Dashboards to Integrate Operations, Validate Business Decisions

Challenge: A leading auto lender's UK office was operating on a BI platform that was not consistent with the global enterprise standard. Fusion was engaged to migrate the dashboards and the underlying semantic layer to align with the standard.

- The customer wanted to migrate all the dashboards to Tableau and take advantage of the opportunity to improve the effectiveness of dashboard design.
- It was critical to recreate the semantic layer so that business logic could be used by more than just the dashboard tools, i.e., other analytics and reporting tools.

Solution: Fusion's team engaged the company's primary UK sponsors to collect requirements in the form of user stories to validate information needs, as opposed to a straight migration.

- Fusion was able to quickly establish working relationships with client to truly partner and collaborate.
- Fusion first focused on creating dealer and sales-related dashboards that were prototyped to look and function like existing ones. This instilled confidence and proved the reports could be recreated in Tableau.
- The dashboards were later modified to present the same information more effectively, leveraging Tableau's capabilities and making

true interactive visualizations. This was in stark contrast to the previous dashboards' reporting-centric design.

- The solution was architected to maximize component/entity reuse to expedite development of other dashboard business areas.
- A custom mart was created to blend Salesforce with core application data that had been persisted in deep and complex XML, creating a semantic model that was performant and easy to use for business users.
- Tableau dashboard development was done iteratively with the customer.
- Dashboards were deployed to a server, and the customer was trained to administer and support the end-to-end solution.

Results: The Tableau dashboards were of significantly higher value than existing QlikView dashboards.

- New dashboards focused on interactivity and data interrogation.
- By rearchitecting components for reuse, the second set of dashboards for sales were developed in half the time.
- Project finished ahead of schedule and under budget.
- The solution was delivered above client expectations.



For more information

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