



USE CASE

Multinational Financial Services Corporation

It took a multinational financial services corporation between multiple employees and an average of two weeks to create Excel and PowerPoint presentations for the purpose of deciding whether or not to launch a new product; however with our help they were able to dramatically reduce the time and manpower (a single employee in minutes) to gain the same insights—allowing the company to make faster, smarter, data-driven decisions on which products to launch in which regions of the world.

Problem

They needed to improve an analytics process that included up to ten employees working for over two weeks to build static Microsoft Excel and PowerPoint presentations that would assist them in determining whether to launch a new product and in what locations.

Our Approach & Solutions

- Worked closely with business users to define requirements, design efficient data models, and build dashboards
- Created strategic data models for each use case using Alteryx to dynamically prep and blend the source data, ensuring it is Tableau ingestible
- Created a suite of dynamic dashboards, keeping data security and employee role-based visibility features in mind
- Produced product training modules that are self-paced; both for dashboard end users as well as employees responsible for upkeep of dashboards

Deliverables



One landing page dashboard (Report Hub), five use-case dashboards (Global Coverage, Pitney Bowes, Merchant Data, Data Quality, 3rd Party Vendor Evaluation)



Four workflows



Data Sources: 100+ inputs (CSVs, SQL queries, mapping databases in Alteryx, etc.)



Training: Six General Upkeep recorded videos (one Alteryx Overview & one Initial Setup for each of Global Coverage, Merchant Data, and Pitney Bowes dashboards/workflows), and 13 General Tableau recorded training videos

