CASE STUDY:
CREDIT UNION

CLIENT BACKGROUND

This leading credit union deployed an enterprise grade reporting tool for more flexible and reliable reporting with advanced analytics. They apply Business Intelligence (BI) best practices to build reporting capabilities, dashboards, and KPIs to continually improve member experience.

BUSINESS FOCUS

This client has grown into one of the largest full service financial institutions in the Northwest with more than 100,000 members and close to $2 billion in assets under management. In an effort to build close relationships with each member, the organization is dedicated to delivering new financial services and products – from online and mobile banking to one-on-one, customized financial planning conversations.

CLIENT CHALLENGE

An early adopter of BI, this credit union is continually committed to leveraging member information as a strategic asset to both improve member relationships and enhance the member experience.

This organization previously partnered with Datasource Consulting to develop a robust enterprise data warehouse solution. They turned to Datasource again to upgrade an existing legacy BI reporting tool. The original data management tool lacked adequate flexibility and enterprise grade functionality.

THE DATASOURCE SOLUTION

Executive leaders partnered with Datasource to fully leverage their new data warehouse. They also wanted support implementing a more robust enterprise reporting solution offering greater consistency in reporting and more comprehensive dashboard capabilities across the organization. Leaders outlined key objectives for the engagement:

Configure, develop, and implement:
Develop a project plan to install and configure the new BI technology, develop the metalayer and all needed documentation to support the implementation, and transition to the BI reporting solution.

Access to reporting, dashboards and KPIs:
Give core business users (20 to 25 individuals) access to a robust self-service reporting solution, including standard reports, dashboards with corporate KPIs, and ad hoc report development capabilities.

Provide support:
Build the solution for power users to develop and modify reports to accommodate enterprise stakeholders' future analytics needs.

SOLUTION ROADMAP

Datasource worked with the organization's development team and business contacts to outline key deliverables for the project, including the following:

- **Analyze existing reports -** prioritize credit union reports to be built, consolidated, or retired

- **Map report contents of critical reports -** leverage reports written in the previous reporting system against legacy databases and map them to the new data warehouse to be developed using the new BI tool

- **Metadata management -** manage the metadata and allow for expansion as the BI program evolves

- **Test cases -** create test plan to include specific test cases and scenarios as well as anticipated results for future development

- **"Gold standard" report approval process document -** develop documentation and test reporting guidelines to support a report approval process to validate current and future reports before the data is shared

more than 100,000 members $2 Billion in assets

THE RESULTS:

The BI tool implementation was delivered successfully, both on time and under budget. Executive leaders and business partners were extremely satisfied with the development and implementation. Users were trained on the reporting solution, and the team is on track to fully decommission their legacy reports and data warehouse by year end.

Today, key business users have self-service access to critical member data, reports, and dashboards, as well as other needed credit union data. They can now fully utilize the data warehouse and use the new BI solution for greater insights. Power users can also create customized reports as needed. Through a simplified interface, the solution delivers sophisticated reporting, dashboards, and ad hoc query capabilities utilizing now readily available data.

Users can view the performance of various business areas, which is essential for providing an exceptional experience for members, which in the end is the main goal for this credit union. Data, reporting, and various other analytics prove vital and effective for their users.

THE RESULTS CONTINUED:

1. **Built report matrix** with metadata on approximately 250 critical and high priority reports– utilizing membership, credit and debit cards, loan servicing, re-financing, compliance, risk, etc.

2. **Report request process -** With the metalayer built out, users can develop reports following the gold standard report template that incorporates workflows for requirements, testing, and approval.

3. **Drag and drop report building -** Users don't have to be technical to create additional custom reports (by following the template, reports are also validated and consistent).

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We are extremely happy with how Datasource applied best practices to build out the metalayer of our BI tool and create a reporting matrix so we have a recipe for building reports down the road Datasource also held 'office hours' to support users on the new BI tool. Datasource partnered with us to ensure that we can be self-sufficient as our needs change and we require new ways to view our data."

- Credit Union Sr. Program Manager

Looking ahead the credit union will continue to expand its use of their new BI capabilities with the goal of strengthening member relationships and improving competitiveness in the marketplace.

Success

PARTNER WITH US

Contact us to learn more about how our data integration solutions can help your organization run more efficient operations.

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