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S O F T W A R E

SIGMA Marketing Insights Makes Discoveries Faster (and Clients Happier) Using Tableau

SIGMA
Marketing Insights

FOUNDED: 1985
HEADQUARTERS: ROCHESTER, NY

SIGMA Marketing Insights, a platform and integrated marketing services company wanted to speed its analytics turnaround time and meet customer requests for self-service business insight. Using Tableau Server, the company has sped insight by weeks, reduced data discovery time by 75% and strengthened customer relationships by meeting the self-service request.

75%
FASTER DATA DISCOVERY

WEEKS
CARVED FROM PROJECT
TIMELINES

100%
'ALWAYS ON' CLIENT
INTERACTION

"It Was Just an Exhaustive Process"

With large, national and global customers spanning multiple industries, SIGMA Marketing Insights (SIGMA) analysts were skilled at running sophisticated analytics that delivered business-critical insights. But those analytics took time—too much time.

"It's really easy to say 'Oh, here's your top-selling product,' but being able to get into why that is happening and getting to where you can help your customers change their customers' behavior or stem the risk of attrition— that took weeks or even months," says Andrew Lucyszyn, Director of Business Intelligence & Digital Analytics at SIGMA. "Tableau helps us get our clients to value faster because they pay us for insights, not how we get there."

A large chunk of that time was due to the data management and discovery process. Customer data can be incredibly diverse—SIGMA analyses have included everything from product sales numbers and crop planting information to museum ticketing data and Google Analytics metrics. SIGMA cleans the data and

loads it into a SQL Server database, the foundation of SIGMA's mi-Link marketing insights platform.

Afterwards, analysts would take their first look at what the customer data indicated. "There's a huge data discovery component before you can even begin to deliver the actual insight. That alone could take weeks with very large and complicated data sets," Lucyszyn says.

Once analytical projects were complete, SIGMA still had to communicate its findings. Unfortunately, the company struggled to find an easy-to-digest format. "We would send things like flat files back, or we'd make massive 80-page PowerPoint decks with our analytics findings, and we would write huge documents that nobody would read," Lucyszyn remembers.

"All in all, it was just an exhaustive process and some projects would linger on for weeks and months," says Lucyszyn.

Customers also wanted to be able to explore their own data while looking at SIGMA results—something that SIGMA wasn't able to accommodate well.

Figure 1: Demo data visualization showing attrition risk, campaign response, profitability, and profit by zip code.

> "Just laying Tableau over the top of these data sources—what took weeks now takes hours. We are completing data discovery probably 75 percent faster ."
>
> — Andrew Lucyszyn, Director of Business Intelligence & Digital Analytics, SIGMA
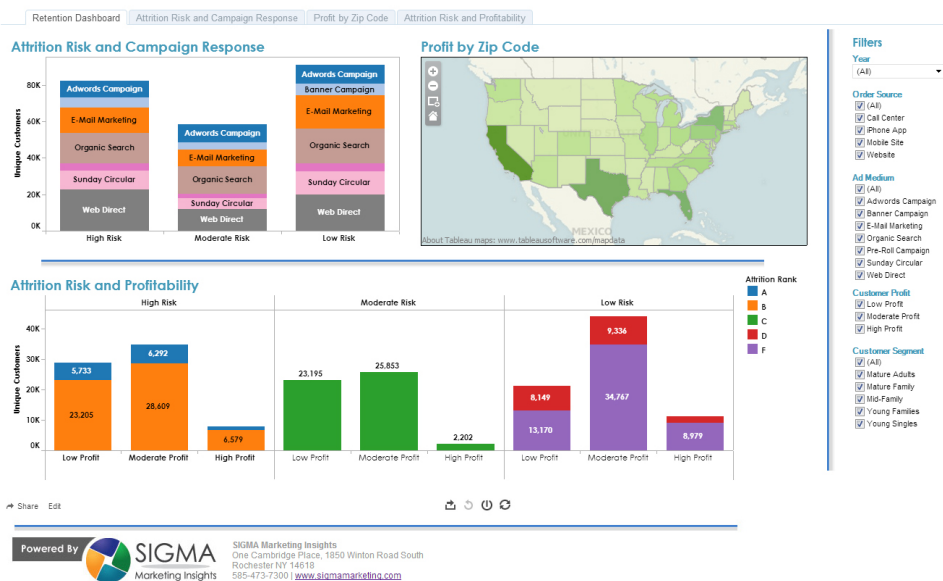
SIGMA soon realized that empowering customers with self-service business analytics was a great business move. Not only would it allow customers to get some answers much faster, but also it could drive more ongoing conversations between SIGMA and its customers.

"Often with these fixed deliverables— presentations or reports—you throw it over the wall and then you're done," Lucyszyn says.

Jumping Into the Deep End

SIGMA began looking for a tool in the fall of 2012. "We tested of a variety of different products and did a lot of trial versions when we were looking for a sophisticated and enticing platform to serve as the customer face of our mi-Link product," says Lucyszyn. "We were building some reports in Performance Point and SSRS, but they were so cumbersome and inflexible."

SIGMA focused on the Gartner Magic Quadrant for Business Intelligence and Analytics Platforms when it began looking for a BI solution.

"We focused on products that would both allow analysts to develop expertise quickly and fit into the pricing model of a mid-sized marketing services company," he says. "Some of the tools we tried, like Qlikview and Spotfire, just presented too many hurdles for development and a clear pricing structure for a company like SIGMA. And we didn't even venture down the IBM road."

"Tableau was the most flexible, the easiest to use, and met our needs for being able to really put the data insights back into the clients' hands." The company embeds Tableau reports into its own branded web portal, using Trusted Tickets to control access.

Initially, SIGMA analysts self-trained using online training videos from tableausoftware.com.

"We tend to learn very well just by jumping into the deep end. It worked very well, but eventually we found we had some very specialized questions," Lucyszyn says.

SIGMA looked at the curriculum-based training programs offered by the Tableau training department, but decided to opt for a customized workshop with Tableau Professional Services.

"It made sense to design something that was more flexible," says Lucyszyn. "And it was just a better value to bring a Tableau pro to our offices—and it kept us in the office where client work wouldn't get short-shrift."

The company has been experimenting with using Tableau's Google Analytics connector to pull Google Analytics data directly into Tableau; SIGMA is talking with customers about doing the same using the Salesforce connector.

Knowing that many customers access the reports on iPads, SIGMA appreciates that Tableau 8 allows them to create reports that are flexible according to the browser requirements. The company is also looking at taking advantage of the JavaScript API functionality in Tableau 8 to create additional levels of interactivity within its web portal environment.

"What Took Weeks Now Takes Hours"

Today, SIGMA Marketing is able to provide customer insights faster.

"Tableau has absolutely made us more efficient. We are able to provide specific insights a lot faster," says Lucyszyn. "Projects that would linger on for weeks and months before are now completed much faster—weeks have been cut down to days."

For the data discovery process, that efficiency gain is even more impressive. "Just laying Tableau over the top of these data sources—what took weeks now takes hours. We are completing data discovery probably 75 percent faster ," Lucyszyn says.

And all of this efficiency has bottom-line benefits for SIGMA. "Our ability to take on new clients is going to be enhanced by this, no question about it."

Using Tableau visualizations embedded in SIGMA's portal, customers are able to discover new information about their own data.
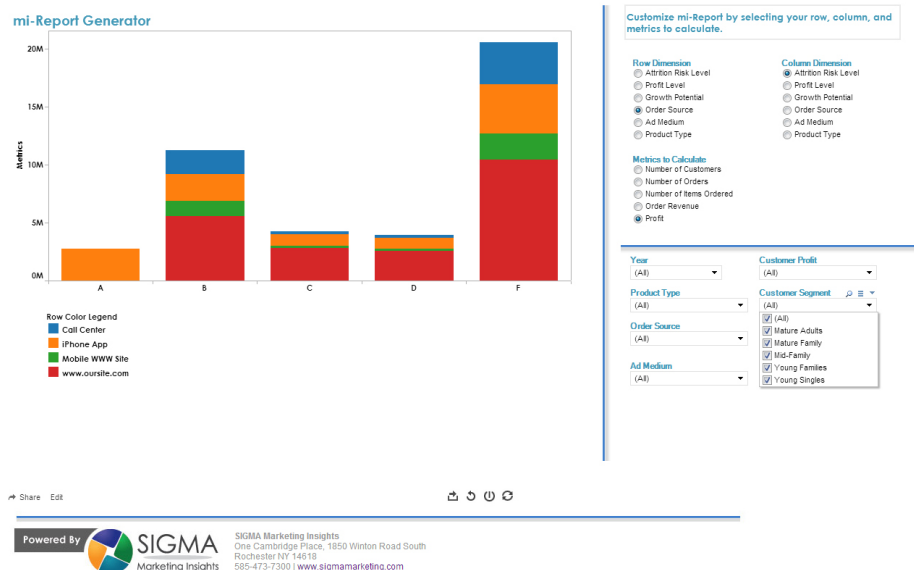

Figure 2: Filters (radio buttons and drop-down lists) allow users to control the data they see.

"Now we can show our clients what's possible with just a couple of mouse clicks," he says. "They don't have to wait for a PowerPoint deck. They can quickly get the answer themselves or have us get the answer for them in a matter of minutes, as opposed to waiting so long for a PowerPoint presentation. Our clients are far more empowered."

This has led to closer relationships with clients. "We are seeing some big rewards already in the strengthening of our client relationships," Lucyszyn says. "And those stronger relationships allow us to explore new areas of what we can do to help them in their business."

That's not the only benefit to SIGMA's customer relationships. "With how we're using Tableau, we're able to maintain our interaction with our clients for a long time. Tableau provides us with an 'always on' interaction—as opposed to 'You've printed that PowerPoint deck and now it's pretty much done.'"

Tableau: Sales Wingman

SIGMA now highlights its use of Tableau as a key part of its sales process. "When we pursue prospect relationships, the number one thing that we show is our customer portal using a Tableau demo set of data. It shows some absolute knockout visualizations."

He describes their demo as including "everything and the kitchen sink—just to show how Tableau lets us put client data on display for our clients in a powerful way."

He points out that their demo allows clients to see how they can interact with the visualizations to answer questions independently.

Lucyszyn believes that showing SIGMA's Tableau visualizations helps the customers understand more quickly the value SIGMA offers. "I can feel that they're getting value from SIGMA insights faster. It's how we want show what we do for our clients," he says.

"As awesome as logistic regression is, being able to show a gorgeous Tableau dashboard is much more salable," Lucyszyn says with a laugh.

Figure 3: Prettier than logistic regression, too.
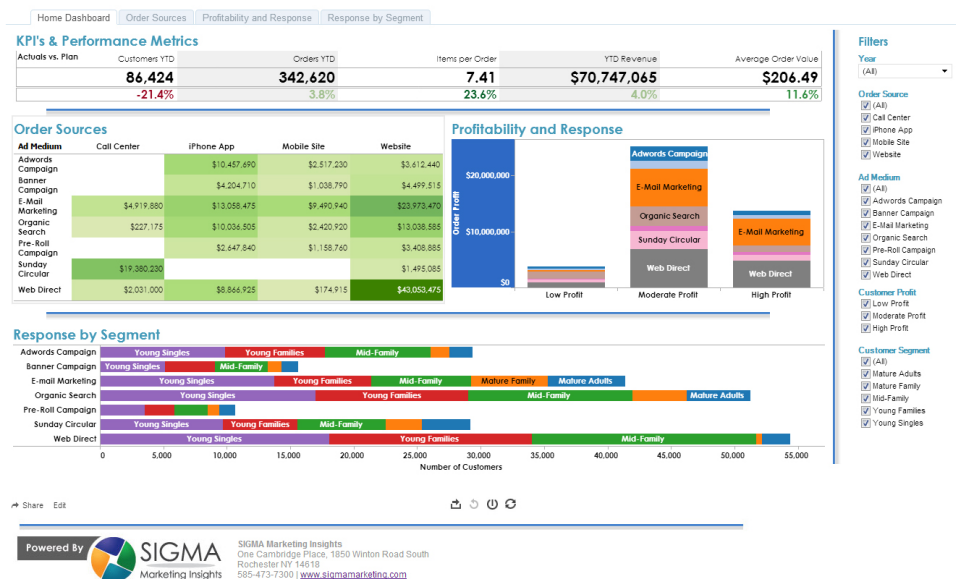
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