



7 signs you need self-service reports

How IT can empower users—and help themselves in the process

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IT leaders in Financial Services have a lot riding on their teams. Security and compliance are essential backbones to keep the lights on. Data storage and management are pressing issues given the massive amounts of information pouring in. Networks and trading systems have to be bullet proof.

But there's another growing pressure that IT must face: the need to provide analytics. Corporate leaders are acutely aware that buried in all their data is the secret sauce for competitive differentiation and industry leadership. And they turn to IT for the solution.

In this era, leaders within many industries – companies like Capital One, Amazon, and Harrah's – have built their prowess on analytical cultures. As Thomas Davenport and Jeanne Harris explain in their book *Competing on Analytics*, "Organizations are competing on analytics not just because they can...but also because they should." [1]

How can you close the gap between the goal to become a data-driven organization and the reality of tight budgets, a business intelligence (BI) team without bandwidth, and demand for solutions that can be up and running immediately? The answer is self-service business intelligence.

Instead of confining your organization to a small pool of expensive, elite, BI professionals, self-service BI equips individuals throughout the organization to do their own analysis. The good news? These people are experts and they know exactly the questions they need to ask and answer. The great news? They'll have a solution that gets them answers quickly they can then share with colleagues, fueling the reality of a data-driven organization.

Are you ready?

How do you know you're ready for self-service BI? Look for these 7 indicators:

1. Execs are demanding analytics. Let's face it – if your senior leadership team is pounding the table, insisting that you become a more data-driven

organization, you can skip to "Getting started" at the end of this paper. But it's likely that your team is seeing at least a few more of these indicators as well.

2. Endless queue of report requests. You've thrown up your hands in exasperation knowing that you'll never, ever get through the list that grows daily. Your crackerjack analyst team is doing their best, but they are only human. The most you can hope for is prioritizing the requests, which usually translates into the highest priority items getting done but most of the others falling on the floor.

3. Reports lead to more reports. Despite your efforts to elicit a full set of requirements before building a report, the follow-up questions never end. While it's good that your work reveals something interesting, it's not so good that the only way to answer the next question (and the 20 after that) is to cycle back through your team.

4. Frustration that data is old. One of the unavoidable realities in the cycle of requesting a report, waiting for the report, then asking more questions about the report is that data gets stale. Both our professional and personal worlds have evolved to the point where we expect instant gratification. This latency just doesn't cut it.

5. Demand for mashed-up data. While people might not use the term "mashed-up," it's what they have in mind when they say "could we layer some third-party market data on top," or "I've got a bunch of stuff in an Excel file and I want to see how it relates to what's here." While you see the value of combining multiple data sources, it's not practical for a centralized BI team to make all these adjustments.

6. Desire for visual analysis. People get more out of data when they can see it in meaningful visual forms versus scanning rows, columns, and tables. If people haven't started requesting more visual data, they're likely to start. How does this relate to self-service BI? When people can see their data in myriad forms, they aren't coming back to you for new views to get their answers.

7. It's already happening. While not true everywhere, many organizations already have rogue self-service BI implementations. Resourceful business leaders recognize your team's bandwidth limits, and they know they've got top talent and projects to deliver. The result is that many have implemented their own self-service BI implementation. The silver lining for IT leaders is that these implementations are yielding bang-up results and you've got willing and eager constituents who will support your self-service BI initiative.

Users Answer Their Own Questions at RBC Wealth Management U.S.

RBC Wealth Management U.S. is a national full-service brokerage firm with over 2,200 registered representatives, over \$170 billion in assets, and a lot of data. Challenged to become a more data-driven organization, they sought a solution that could make self-service BI a reality.

"I've worked with many BI tools that claim to put the power in the users' hands and simplify BI. And it's never ever happened," explained Shawn Spott, Vice President and Manager of Marketing Research. Then Shawn and his team discovered Tableau.

The team partnered with IT to create a self-service BI environment. They started with a pilot program, "which had an amazingly positive response from the users," said Shawn. "In August we had an idea to implement Tableau Server – by the end of September we were live in production and users were already asking for more."

Shawn goes on to explain that, "Because Tableau Server provides us with a self-service model, we're able to continue to keep projects moving through the pipeline. The maintenance footprint is so small, we just load and go. We spend three weeks of the month solving new problems and doing new development. It's been off-the-charts successful."

Multiple groups within RBC are now using self-service BI. Management, equity analysts, product line teams, sales support, finance, and marketing have all adopted self-service BI with Tableau, delivering on the promise of becoming a more data-driven organization.

Hear more from Shawn Spott about how Tableau has impacted RBC Wealth Management U.S. in this [video](#).

If any of these scenarios feels familiar, it's time to get started with your self-service BI solution.

What's in it for IT?

Self-service BI isn't just about making more people able to do their own analytics. En route to this end game, IT benefits, too.

Optimize your data infrastructure

Instead of drowning in BI requests, you free up resources to determine how best to set permissions and access to the wealth of data you manage. Now when individuals in your company do their analytical work, you're satisfied they're accessing accurate and secure data.

Increase ROI on data investments

If you're like most organizations, you've invested significantly in data warehouses, applications, and associated quality and integration to ensure your data is useful. By exposing this data to more people in the organization, the value of these assets skyrockets.

Maintain governance and security

This becomes especially valuable if you're an organization with one of those renegade departments already using self-service BI. When you take charge of the implementation, you can layer in protocols that align with your IT standards.

Let BI specialists go deep

Instead of facing a constant barrage of never ending requests, self-service BI reduces the queue and lets your highly trained BI specialists focus on small, select body of work that maximizes their talents.

Become a SUPERSTAR!

Sound hokey? Perhaps, but it's true. IT departments that have deployed self-service BI experience benefits they never foresaw. Sheel Bhatiani, Lead Software Developer at Cheyne Capital explained that with Tableau he now says, "Hey, here's the data, here's where you can find it...go look at it yourself. And the

“ I would say we’re producing around double with Tableau what we were before with the same number of people.

So in terms of savings for the organization and efficiency for my team, the effect has been really valuable and extremely profound. ”

– Dana Zuber, Vice President, Strategic Planning Manager, Wells Fargo

users themselves say, ‘Oh, I want to see this a different way.’ Click, Click, and it’s there.” At the heart of these “a-ha” moments are people who feel smarter, teams that have more insight, and an organization that excels. And they thank IT.

Getting started

Implement a self-service BI solution that respects your security protocols and data architecture. Deliver on the promise of empowering individuals do their own analysis. Your solution should snap-in easily to your existing infrastructure and get off and running fast. Training should be minimal and results should be quick.

Tableau Software has pioneered the world of self-service BI for over eight years. It has been built from day one with an eye toward making it easy for anyone in an organization to analyze data on their own. In the same way Salesforce.com transformed access to customer data, Tableau is shifting the way professionals of all types – not just BI specialists – analyze data.

Experience Tableau for yourself to see how your organization can be empowered with self-service BI. Download our [full-featured trial](#) of Tableau Desktop then watch our 14-minute [“Getting Started” video](#) and you’ll be on your way to understanding how everyone from a marketing professional to a sales leader could be doing their own analysis in minutes.

End notes

[1] Thomas Davenport & Jeanne Harris. *Competing on Analytics*. Harvard Business School Publishing Corporation. 2007.

About Tableau

Tableau Software helps people see and understand data. Ranked by Gartner and IDC in 2011 as the world's fastest growing business intelligence company, Tableau helps anyone quickly and easily analyze, visualize and share information. More than 7,000 companies get rapid results with Tableau in the office and on-the-go. And tens of thousands of people use Tableau Public to share data in their blogs and websites. See how Tableau can help you by downloading the free trial at www.tableausoftware.com/trial.

About the Author

Malia has over 15 years of marketing and strategy experience in the technology industry. At IBM, she led product marketing for the data integration, data quality, and master data management products then developed growth plans for emerging market countries. Prior to IBM, Malia worked in venture capital, consulting, and investment banking where she evaluated and developed business plans, marketing strategies, and financing scenarios. Malia earned her M.B.A. at Duke University's Fuqua School of Business and her B.A. at Wellesley College. @maliahardin