



DATA VISUALIZATION AND ANALYTICS FOR FINANCIAL SERVICES ORGANIZATIONS

How roles across the financial institution
can best use cloud-based analytics

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GIVE YOUR CUSTOMERS THE INFORMATION THEY NEED, WHEN THEY NEED IT.



A well-conceived customer journey touches all roles in a financial services organization. Data visualization can be used to predict customer behavior, retain customers and increase loyalty, and drive business growth.

Data visualization enables you to bring data, such as credit card purchases, mortgages, or call center activity, together from multiple touchpoints for a comprehensive view of your data. A robust, visual analytics platform allows a consolidated 360-degree view of your data across all lines of business. Internal teams within the financial institution and customers can all use the platform to see everything in one place. Customers can also access a personalized view of the accounts across their portfolio. High availability and a responsive interface allow end users to drill down and find exactly the information they are seeking.



This eBook highlights how three different financial services roles benefit from robust cloud data visualization and analytics solutions deployed to support the customer service experience. Choose the role below to learn more about how cloud-based data visualization supports great customer experiences:

- The **financial services business professional**
- The **financial services IT professional**
- The **financial services customer service and support professional**



THE FINANCIAL SERVICES BUSINESS PROFESSIONAL

You are a sales or account manager, business development lead, wealth advisor, or portfolio manager. To grow your portfolio, you have to know your customers. There is a large amount of data available to you; every login, click, and transaction becomes a clue helping you to figure out what your customers need. But how do you separate “noisy” meaningless data from the data that will give you deep insights into what your customers need?

You need an analytics platform on the cloud that can give you tools to quickly analyze your data sets and understand customer behavior. Your data visualization and analytics solution should work well in your environment, with your data, and help you unify all of your customer data—from shopping and account opening to onboarding and through relationship expansion—under one roof for analysis.



THE FINANCIAL SERVICES BUSINESS PROFESSIONAL (CONT.)

Data visualization can help you analyze every type of customer data, from how a customer is navigating the company website, to whether certain types of customers are more likely to buy certain types of financial products. Using these insights, you can identify new opportunities for growth, such as being able to recommend and price new services. When you understand customer interests and habits, you can in turn identify the customers most likely in need of specific products. When you ensure that all stakeholders use the same information, you're able to build consistency and confidence in your data across all of your teams and work more efficiently.

Learn about another role:

- The [financial services IT team](#)
- The [financial services customer service and support professional](#)
- Learn how you can [get started today](#)



THE FINANCIAL SERVICES IT PROFESSIONAL

Business leaders have a vision for creating outstanding customer experiences, but it's you—the IT team in a financial services organization—who are called upon to develop, pilot, implement, test, and improve offerings. In order to deploy the solutions best suited to supporting the customer service experience, those solutions need to be able to leverage your existing technology investments. They should be simple to deploy and monitor, scalable, highly available, secure, and reliable. The fewer issues an IT team has to address after a solution has been implemented, the better the customer experience will be.

To support a customer service experience that's truly excellent, you need a solution that allows you to scale analytics across all employee groups quickly and easily. You're looking for technology that can be incorporated and branded into customer-facing digital applications. At the same time, that technology needs to be available for sales teams to perform internal analytics to create pricing strategies, and to your risk and compliance teams to ensure you are meeting all required compliance standards.



THE FINANCIAL SERVICES IT PROFESSIONAL (CONT.)

A self-service, governed analytics platform hosted on the cloud allows your IT team to use only the compute resources you need to meet your organization's needs. You're not bogged down with the paperwork and extreme cost of provisioning servers, buying expensive multi-year licenses, or hiring dedicated professionals to design, code, and deploy dashboards. Instead, your team can focus on what really matters: providing solutions across your organization that help customers achieve their objectives and solve their problems using your brand.

Learn about another role:

- The [financial services business professional](#)
- The [financial services customer service and support professional](#)
- Learn how you can [get started today](#)



THE FINANCIAL SERVICES CUSTOMER SERVICE AND SUPPORT PROFESSIONAL

In the midst of a busy day, a customer logs in to check a balance in an account. How might the end customer's experience impact your customer service and support team's priorities and duties, day to day? Today's financial services customers are digitally savvy and expect information to be easy to find and examine in real time, as well as customized.

You need a data visualization platform that not only serves your internal teams—but also has a customer-facing presence. After all, you want customers to login to see a seamless 24/7 high-quality personalized experience, backed by highly available, real-time data. Your customers don't need to know how that technology is woven into your financial services organization's digital applications; rather, they simply need to know that they can get what they need when they need it.



THE FINANCIAL SERVICES CUSTOMER SERVICE AND SUPPORT PROFESSIONAL *(CONT.)*

As a customer service and support role, you benefit from this, too. Because your customers can now directly access their accounts and dashboards from anywhere, at any time, all from one place, this cuts down on the time needed for support calls. Instead of answering inquiries about account balances or checking to see if a customer's transfer was completed, you can focus on deeper customer service issues and helping customers stay customers.

Learn about another role:

- The [financial services business professional](#)
- The [financial services IT professional](#)
- Learn how you can [get started today](#)

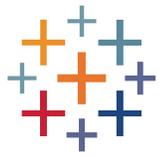


TABLEAU ON AWS: CLOUD-BASED DATA VISUALIZATION FOR FINANCIAL SERVICES



To create great customer experiences, you need a solution that:

- Enables you to quickly analyze your data sets and understand customer behavior.
- Scales analytics across all employee groups quickly and easily.
- Gives customers easy, self-service, personalized access to account information.

Consider a cloud-based data visualization solution from Tableau. Tableau is a secure, powerful, flexible end-to-end analytics platform offering smart, visual, direct access to data for every stop of your analytics journey. Tableau's cloud-based implementation runs on Amazon Web Services (AWS) and can be seamlessly deployed into an existing AWS account.

Tableau on AWS can be used to scale embedded cloud-based data visualization quickly to meet customer needs. You can spin up instances of Tableau Server to allow multiple departments inside your organization to analyze their own data sets, much more quickly than would be possible with an on-premises deployment. Cloud economics ensure that you are only paying for what you are actually using, which often leads to a lower total cost of ownership for the entire solution.

Features of Tableau on AWS include:

- Full integration with AWS to maximize the return on your organization's data and to leverage your existing technology investments.
- Direct connections to AWS data sources such as Amazon Redshift (including Redshift Spectrum), Amazon Aurora, Amazon Athena, and Amazon EMR.
- Connections with many other data sources such as SQL Server, Cloudera, and numerous cloud applications.

[LEARN MORE ABOUT TABLEAU ON AWS](#)

[GET STARTED TODAY WITH TABLEAU'S AWS QUICK START](#)



For financial services organizations who want to improve the customer experience to drive retention and increase share of wallet, Tableau gives you a complete view of your customer's journey and helps you discover insights with powerful and intuitive analytics, all while ensuring your data adheres to required security and compliance rules.