



# 7 signs you need self-service reports

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

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May 2012

IT leaders have a lot riding on their teams. Hot topics range from ensuring security and evaluating SaaS models to managing an exploding data infrastructure and supporting mobile devices. All this against the backdrop of shrinking budgets and faster delivery timeframes.

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 Amazon, Capital One, 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."

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? Self-service business intelligence.

Instead of confining your organization to a small number of expensive, elite BI professionals, self-service BI equips individuals throughout the organization to investigate their own data, including creating reports and dashboards as well as ad-hoc 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 that they, in turn, can 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 best you can hope for is prioritizing the requests, which usually translates into the highest priority requests getting met, 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 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 their 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.

“ Having a self-service model is great, because I’m not inundated with request after request that I have to put all together. Instead, I can put out a few tools and they [teachers and administrators] can work with those and get a lot of the answers that they need.”

– Jac Thiessen, Data Warehouse Specialist, Millard Public Schools

**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 efforts.

### **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." Shawn Spott, Vice President and Manager of Marketing Research. Then Shawn and his team discovered Tableau.*

*Shawn's 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," explained 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 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 a 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. 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. "This is a win-win for everybody. I look better

“ What we like about Tableau is that there is no training required, or if there is it’s maybe 15 to 30 minutes where we point people to a few reports.

Our users can quickly get in and start to look at data. With other tools, the training sessions could be a full day or longer, and you still wouldn’t necessarily be able to use the full power of the tools.”

– David Botkin, Vice President of Business Intelligence, Playdom

and our team looks better. IT becomes superstars,” explained Charles Boicey, Informatics Solutions Architect at University of California Irvine Medical Center.

## Getting started

Implement a self-service BI solution that respects your security protocols and data architecture. Deliver on the promise of empowering individuals to do their own analysis. Your solution should snap-in easily to your existing infrastructure and get up 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 on making it easy for anyone in an organization to analyze data on their own. In the same way Salesforce.com transformed meaningful 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](#). 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.

### How the City of Charlotte Works Faster, Smarter By Providing Self-service BI

*In the city of Charlotte, North Carolina, Business Support Services (BSS) is one of four units focused on a mission to “advance the business of public service.” Over the past two years, analysts within the BSS Information Technology Division (BSS/IT) have looked for ways to improve the use of data to service customers.*

*Traditionally, BSS/IT relied on a combination of Excel and their team of sophisticated programmers to analyze data and create reports. Departments throughout the city used the reports to make decisions. Unfortunately, the reports fell short. They were time intensive to create and difficult to understand.*

*BSS/IT introduced Tableau because of its ease-of-use and emphasis on visual analytics. These were important factors to accomplish two goals: 1) increase the number of people who could do their own reports, dashboards, and ad-hoc analysis and 2) improve the quality of analysis so the results were easy to interpret. “Reports that previously took days or weeks to create are now completed within minutes or hours,” said Jim Raper, manager of data administration for the City of Charlotte. “Now more time is spent digging into data and identifying outliers, trends, and exceptions to the norm.”*

*As more departments sought to benefit from self-service BI, creative ways were found to get people involved. A “Business Analysis Olympiad” for example, invited employees from across the City’s 14 Key Business Units to compete for using a set of sample data.*

*“We wanted to promote Tableau as a tool that would enable our Key Business Units to significantly enhance the efficiency of their data analysis processes and the quality of reports they produce, said Raper. “The event was a success. It opened a lot of people’s eyes to the value of visual analytics in making timely and important business decisions. During these hard economic times, the ability to work smarter and faster is of extreme value, and Tableau allows us to do just that.”*

## 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](http://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