CUNA MUTUAL GROUP

AXIS

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Sales Reporting and Analytics

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President

Investment and Disconnect

Everyone has invested in analytics: Tools, people and projects

IT is one of the biggest spends in the history of business

Despite all this buying, you're not where you thought you'd be by now

"80% of Data Analytics project fail to meet the desired outcomes"

Gartner 2018

Outcomes From Data

- Business is increasingly competitive

- Using data to make informed decisions should – Increase your top line, bottom line or control risk.

- Building the right framework to take on opportunities using data are a must-have for organizations.

- Make the right decisions on a continuous basis.

Choosing The Right Target In A Sea Of Opportunities:

- Clearly understand the business and problem state

- For whom and how should the solution be used

- What data, integration, security and people are required

- Does the right data exist

- What would be the MVP for the target Outcome

- ROI ($ and time)

- Own It – Throwing it over the fence will not get you there
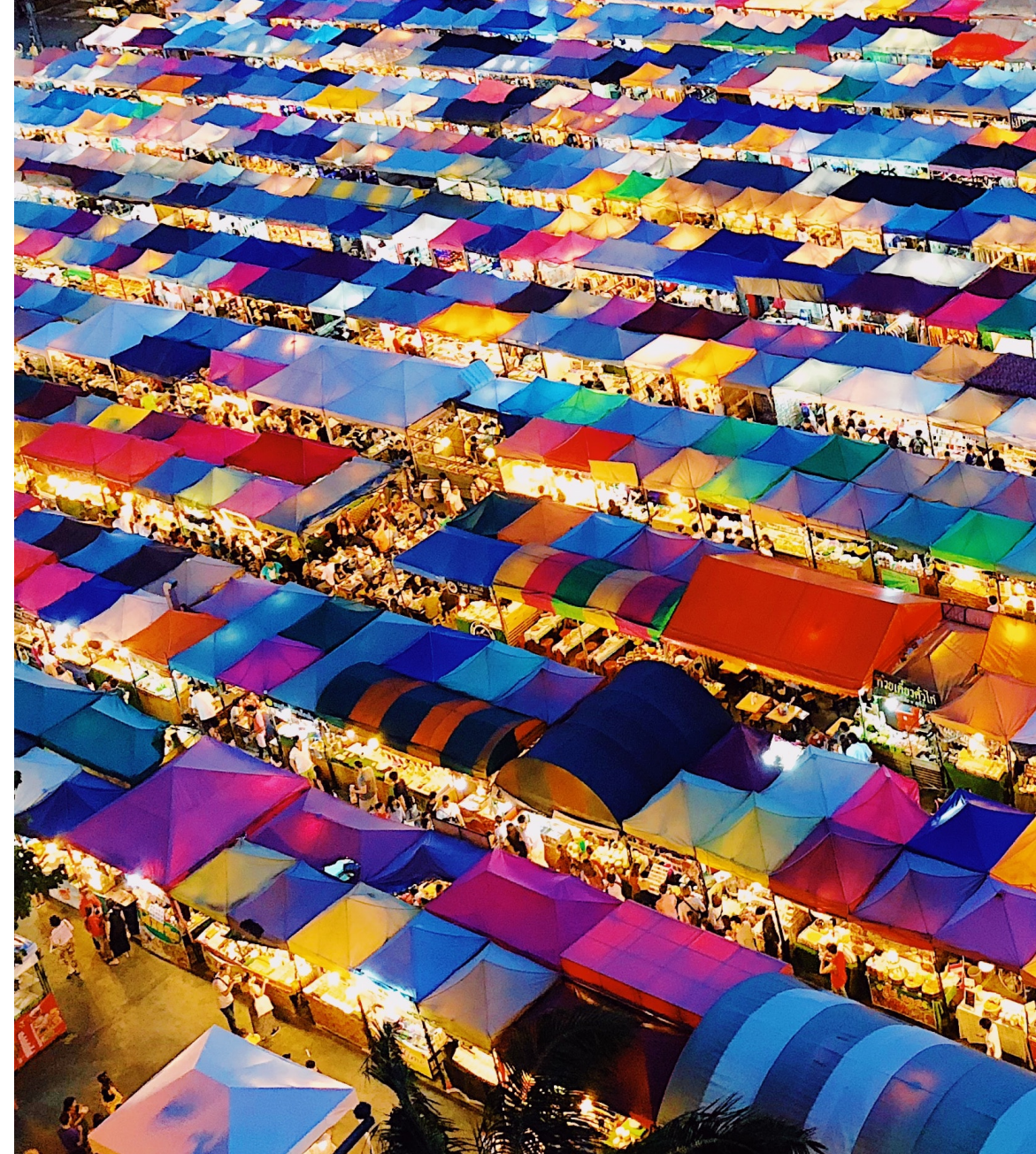
Journey | Solving For Outcomes

Interivew Key Stakeholders

Conduct a deep-dive into strategic decision making use cases.

Understand what efforts to manage may already be in place, roadblocks and the specific roles and goals of these stakeholders.

Conduct Data Discovery

Evaluate source system data for quality and completeness and to understand structure and relationships. Develop a descriptive, current-state analysis.

Create Personas And User Stories

Based on analysis of interviews, create and validate personas and user stories that lay the foundation for application development.

Ideate And Refine

Quickly present example visualizations and analysis flow to stakeholders for validation. Refine and update to solidify front-end design.

Develop And Iterate

Develop analytics solution in an agile, high-touch manner to ensure optimal alignment with stakeholder goals and begin the process of socialization and adoption.

Testing And Validation

Conduct integration, performance and user acceptance testing. Work with subject matter experts to validate output values and ensure trust.
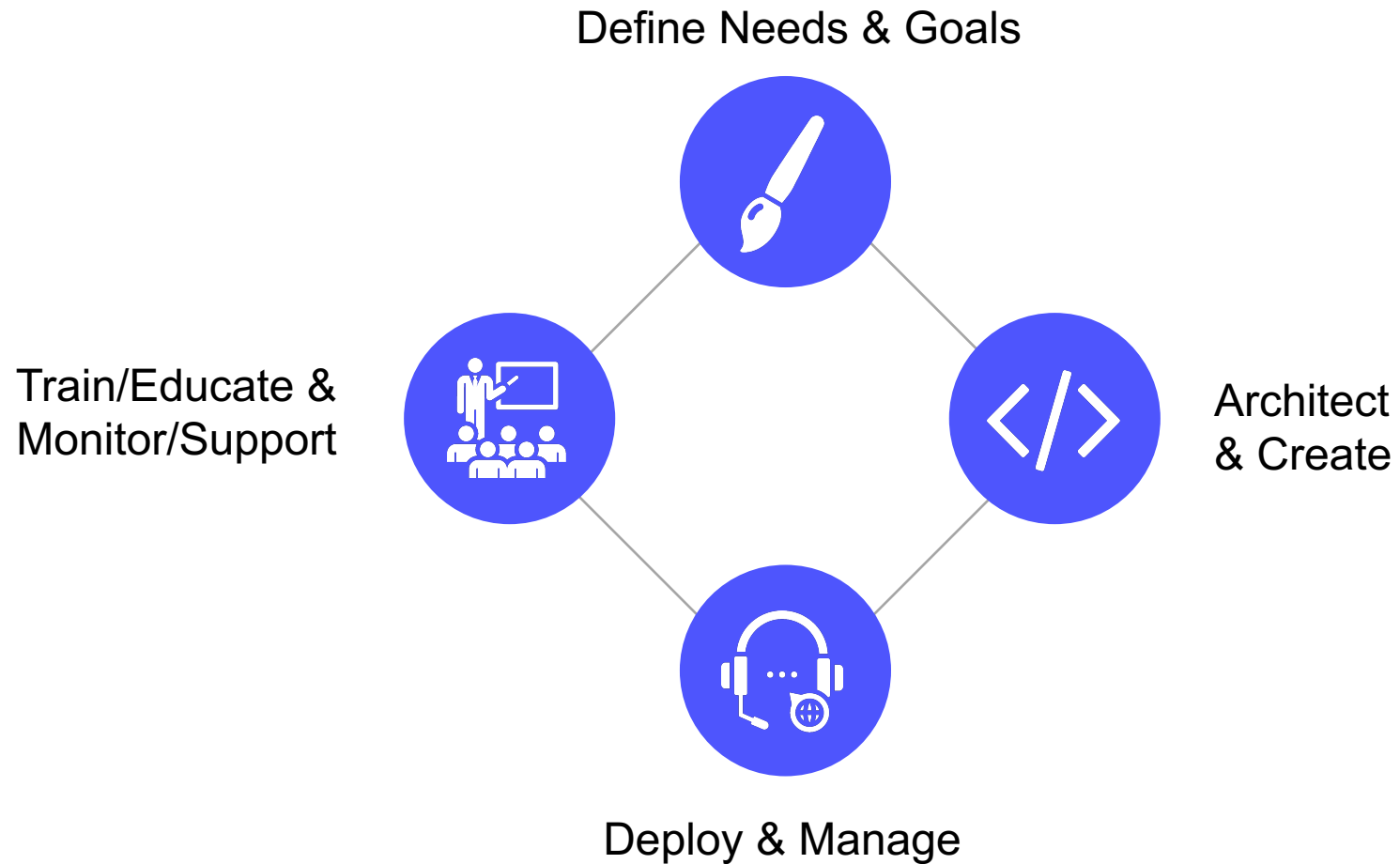
Manage And Drive Results

Train users, provide support and monitor adoption ongoing. Manage and drive results.

Technology

- Meets the Outcome

- Fast to setup, Flexible and Scalable

- Easy to manage

- Financially cost effective

THE RIGHT SKILLS & STRUCTURE | FOR OUTCOMES

Define Needs & Goals

Train/Educate & Monitor/Support

Architect & Create

Deploy & Manage

Use Cases

- Use Case Development:

- Quantifiable outcomes

- Actionable information to target users and systems

- User and Outcome Centric Design

USIC

The "call before you dig" people, USIC sends technicians to the field to prevent damage to underground utilities.

With thousands of technicians driving to conduct more than 70 million "locates" annually, it is inevitable that some drivers operate less safely than they should.

Over 20 use cases identified by meeting with management 5 years ago
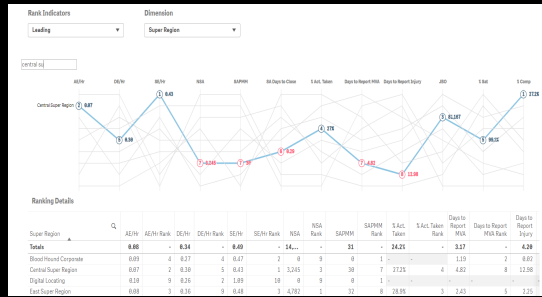
Over 100M gained and counting
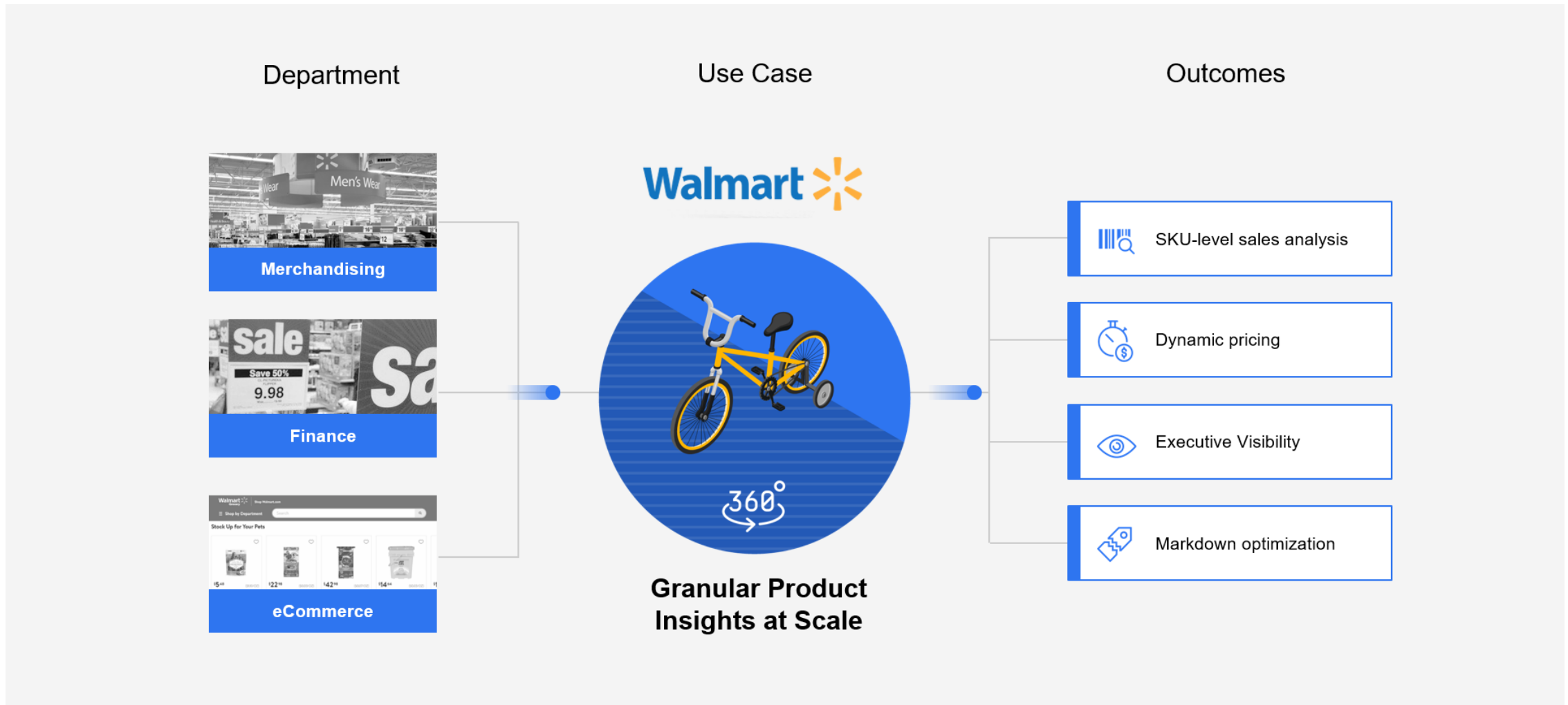

Claims
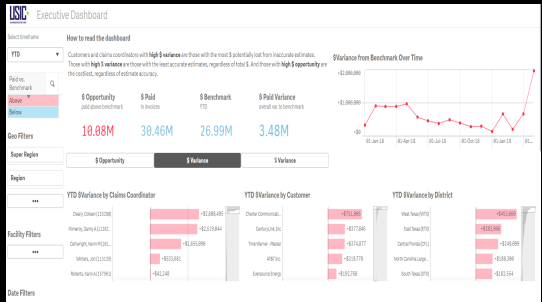
Driver Behavior
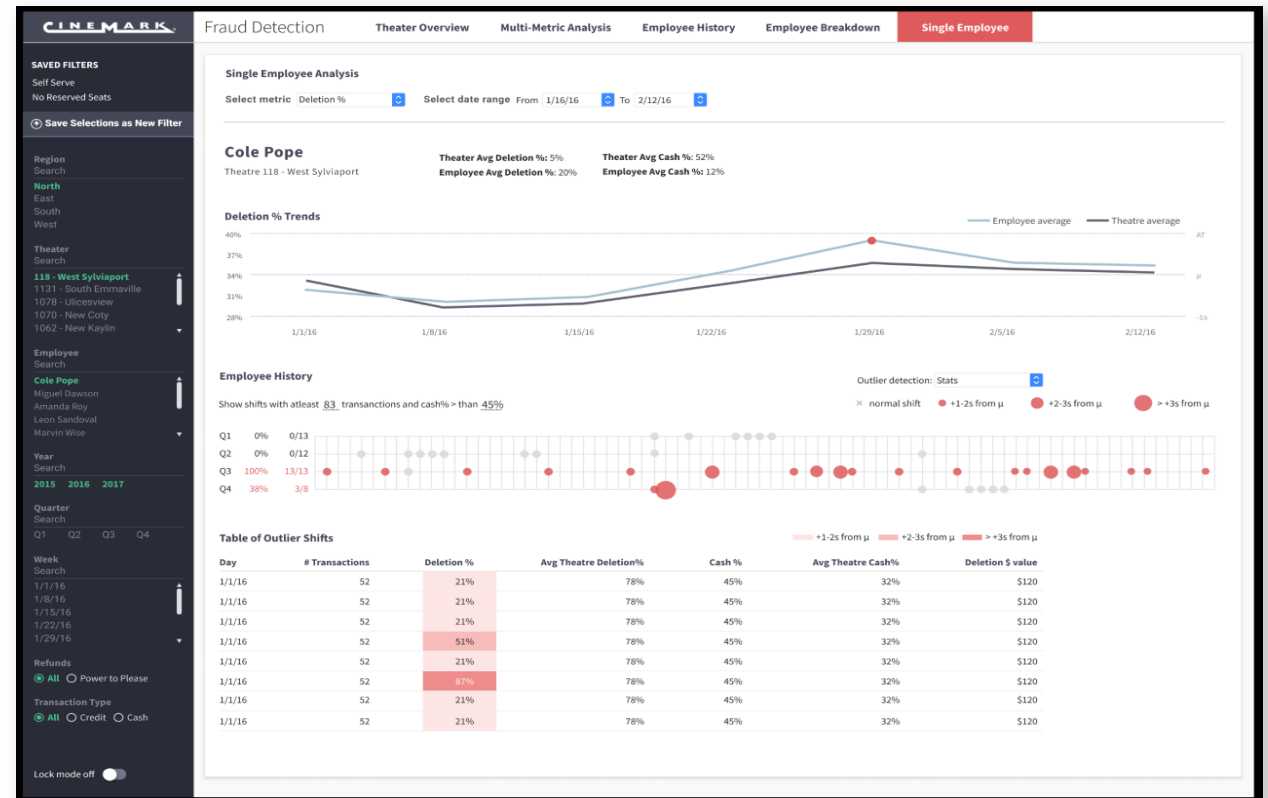
Safety

DigCheck

Walmart

Cinemark

How can the company rapidly detect small frauds across hundreds of movie theaters and millions of transactions?

Original plan "Speed up review process"
Current plan "Detect issues and bring forward"

Conclusion

Focus On Outcomes Though Use Case User Needs

Base all decisions on what you are hoping to achieve

Think Programtically With Standards And Repeatability

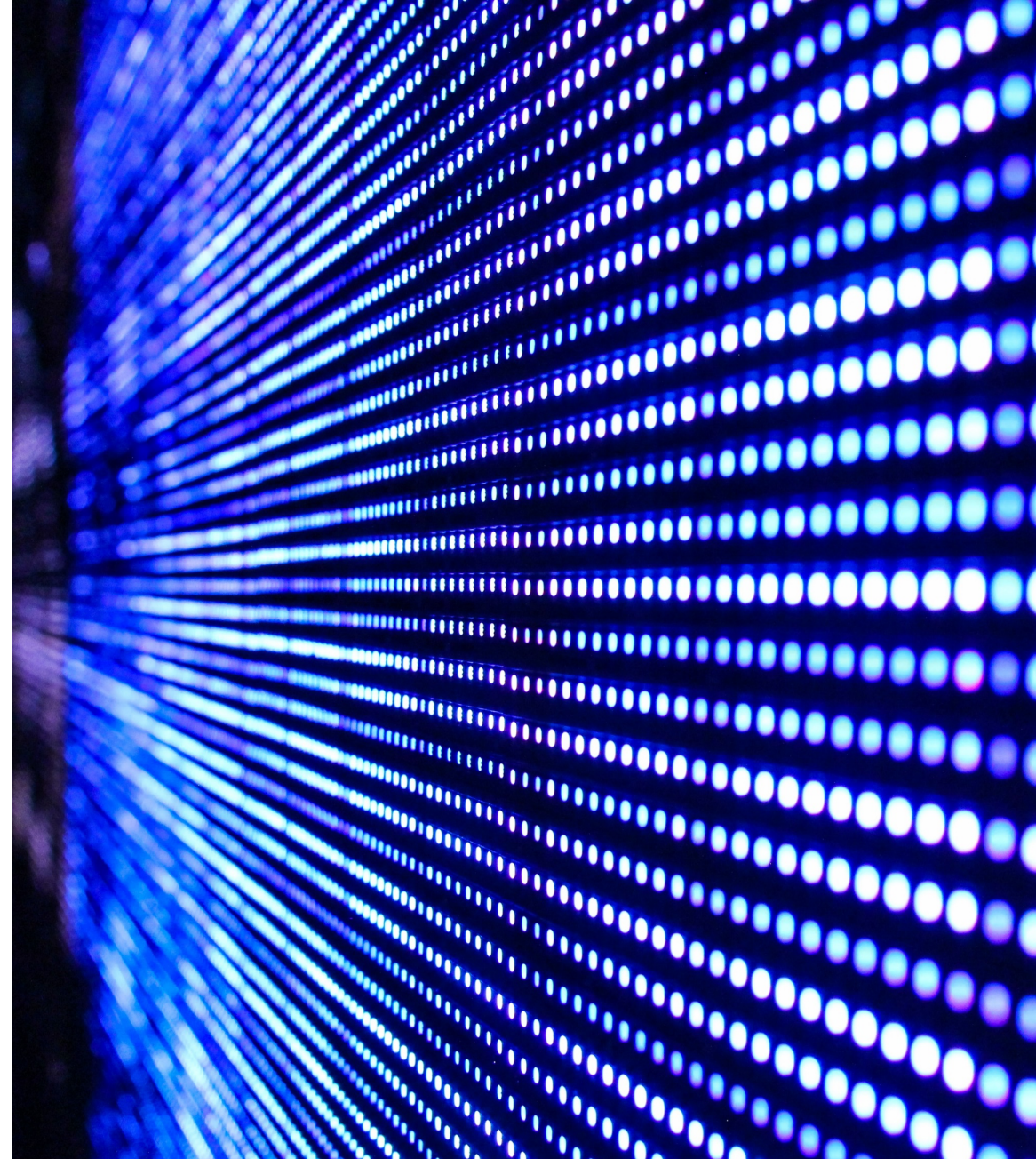It's a journey with lots of building and learning. Fail fast, build on success

Architect Scalable Solutions

Build on the right technology and the right people

Measure Results And Market Success

Promote your efforts internally, building momentum for future use cases

Axis Group

For over twenty years, Axis has delivered thousands of business intelligence solutions to satisfied customers. By using best practices we help our customers understand the key drivers behind their BI initiatives to be successful. Our solutions around Dashboards, Co-Sourcing, and Data Integration and Data Warehousing combined with our expertise in Business Intelligence, Data Governance and Project Implementation, have been successfully implemented at Global 1000 firms as well as mid-market organizations.

Founded in 1935 by the credit union pioneers, the 4,000 employees of CUNA Mutual Group are committed to the success of credit unions.

- $3.8B in revenues
- $20.6B in assets
- $2.1B in benefits

"Forward-thinking?

How about reacting, adapting and surviving change?"

Change Drivers - No Pain No Gain

Growing Expectations?

- **Data** Driven, **Data** Appetite

- **Self-Service**

- **Expense** and Resource Pressure

- **Agile** Methodology

- **Transformation**/Fintech/Growth Initiatives

- **Reorganization**

- **Mission**/Strategy Alignment

Change is Painful

Our Pain Relief

$+$

Technology – Our Advil

Alteryx Impact

What about the data?

- **70%** of any reporting/analytics project **spent on data**

- IT **constrained resources**, time to add new data tables

Benefits

- **Easy to blend** multiple data files and types by **drag and drop** data workflows

- **Fast**, Minutes/Seconds to run

- **Integration** with many platforms such as ThoughtSpot

- In Process **Error Checking**

- **Data Analytics** – Citizen Data Scientist

Technology – Our Advil

"ThoughtSpot is unlike any other tool out there.
So don't think of it like any other tool out there."

Why ThoughtSpot?

Expectations

- **Victim of success** – accelerating requests/requirements

- Wasted **productivity** – "Excel Madness"

- **Share data** outside of the company

- **User experience** - embed dashboards inside existing tools

- **Data security** concerns and Role level security

- Business **Insights**, AI - Tell me something that I didn't already know

Why ThoughtSpot?

Benefits

- Reduce reporting **backlog, faster** dashboard creation
  - Think – Ask – Do: **NLP** self-service
  - Low training requirements - Google **Search** for Analytics

- **Embedded Analytics**
  - External to our **customers**
  - Internal for improved **user experience**

- Exceeds our **security** requirements

- Business **Insights**
  - Analyze **Trends**
  - AI-based insights, **Augmented Analytics**

Why ThoughtSpot?

Results

Embedded Analytics

- Retirement application

- Credit Union League dashboards

- Other external dashboard applications

- Salesforce Embedded reporting

Internal

- Elimination of Tech Debt

- Sales Reporting POC's

Leverage Culture

- **Attitude** – Growth versus fixed mindset

- **Trust** and **Dissent**

- **Teamwork**/Cooperation – All Win, All Lose

- Continuous **Improvement**– **Agile** mindset

- **Diversity** – Personalities, Backgrounds, Styles

- Work Ethic – **Bias** toward action

- **Creativity** – Curiosity, think outside of the box

- Have **Fun**

Summary

+

The winning combination to both **survive** and **lead** in a state of change

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DATA ANALYTICS CONFERENCE

Thank You

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