

# KPI Monitoring and Data Analysis Environment Migrated to Tableau

All Forms Usable After Four-Month Migration Period

## 632 people

Number of people that have logged into Tableau in the past 90 days, including affiliates

## 3,000 views

20 people migrated existing forms over the course of four months

**SmartNews, Inc.**

<https://www.smartnews.com/>



Business Type : IT

Number of Employees :

More than 600 (consolidated : 2022/6)

Address : Shibuya-ku, Tokyo

Business Description : Founded in 2012, SmartNews is a leading global information and news discovery company, dedicated to delivering quality information to the people who need it. SmartNews provides news that matters to millions of users thanks to its unique machine learning technology and relationships with over 3,000 global publisher partners.

### Issues Before Deployment

#### Existing BI tool service discontinued

The service that provided the tools that all employees were used to using was discontinued. That's why SmartNews was looking for an exceptional tool that could be used long-term.

### Solution

#### Migration to Tableau

SmartNews considered several tools and confirmed that with Tableau, it could use all of its existing forms the same way it always had. The new system went into operation after two months of preparation and a four-month migration period.

### Benefits of Deployment

#### Same level of performance

Many users had been using Tableau at previous jobs, and many employees have an understanding of SQL, so everyone could use the system in the same way as the previous system.

### Reason for Selection

#### Peace of mind

Even in the case of superb tools, service can be discontinued. Tableau has been providing service for years, and that stability provided the company with great peace of mind, leading it to choose Tableau.

Date of Deployment : September 2021

Deployed Product : Tableau Online, Tableau Data Management

Number of licenses : Creator:270 Viewer:980 + Data Management

Primary Usage Environment : KPI monitoring and data analysis on Tableau Cloud

Deployment Time : Total of six months



## Customer Profile

**Name :** Kuan Li

**Position :** Business Intelligence Analyst

**Division Name :** Product Division, Data Science Group

**Main Duties :**

Preparation of business intelligence environment for use within the company. Operation and management of platform used by all employees in Japan and the U.S.

### Background Behind Deployment

#### Enduring service and long-term relationships

SmartNews, Inc. is the operator of SmartNews, a smartphone app that delivers a variety of news in collaboration with over 3,000 media partners. In 2014, it began operations in the U.S. market and has grown to become the news app with the highest average time spent per user per month (as of July 2021). In the future, it is looking to expand its services to all regions and languages.

The SmartNews app is free to use, generating revenue through advertising. SmartNews has agreements with various media to provide appealing news content and offers users greater ease of use, while at the same time focusing on optimizing ad delivery. To maintain the proper balance, it is vital to visualize and analyze data such as logs, which are

all recorded in digital form.

As KPI, it uses app user data such as MAU (monthly active users), WAU (weekly active users), and DAU (daily active users), article impressions, clicks, ad impressions, views, and other key figures. These are used in various ways, and almost every department in the company requires KPI monitoring and data analysis capabilities.

SmartNews has an established culture of using dashboards in all kinds of situations. For example, when performing A/B testing with the aim of improving the app, a dashboard is created to visualize models for maximizing ad revenue and creating more usable designs. It tries to look at things from a variety of perspectives to find better solutions.

## Q1. What impressed you about Tableau?

### A1. Accelerated user utilization

"It's only been 8 months since we began full-fledged use of Tableau, but everyone is using it so much that we're already reaching the limits of our storage."

## Q2. What changes have you seen since introducing Tableau?

### A2. Intuitive operation

"Some employees had been using Tableau at previous jobs, and many employees have an understanding of SQL, so people grew comfortable using it even faster than we had expected."

## Tableau Deployment and Operation Environment

### Deepening the company's data-informed culture

Almost all of SmartNews's employees worldwide utilize Tableau Online and Tableau Data Management to visualize and analyze all kinds of data related to their work. Since the company was established, it has had a data-informed culture, and by providing all employees with the flexible Tableau environment, it aims to deepen this culture.

The majority of the data used in its operations is stored in a Hive data warehouse built on AWS S3 and is normalized with Presto/Trino Hive connector. Tableau can link not only to this main data warehouse, but also to other sources, freely extracting data as needed and displaying it visually in a dashboard.

To promote greater use of Tableau, it prepared roughly 50 documents on topics such as how to create dashboards and how to connect to databases. It also created an extensive FAQ and a dedicated Slack channel. Number of people that have logged into Tableau in the past 90 days, including affiliates. For 150 heavy users, such as data scientists and BI analysts, it provides Tableau Creator licenses, which make it possible to use advanced functions such as connecting to data sources.

"It's only been 8 months since we began full-fledged use of Tableau, but everyone is using it so much that we're already reaching the limits of our storage," says Kuan Li.

## Reason for Choosing Tableau

### Enduring service and long-term relationships

Before deploying Tableau, SmartNews had been a long-time user of a global BI platform. However, in 2021, the service announced that it would be shutting down. The tools provided by the service were essential to SmartNews's business, so it was vital that the company find a solution to replace it.

"I didn't want to go through that ever again," recalls Li. "For the replacement, we needed to choose a tool that we could trust wouldn't be discontinued." SmartNews compared and considered three tools. After a two-month trial period, it

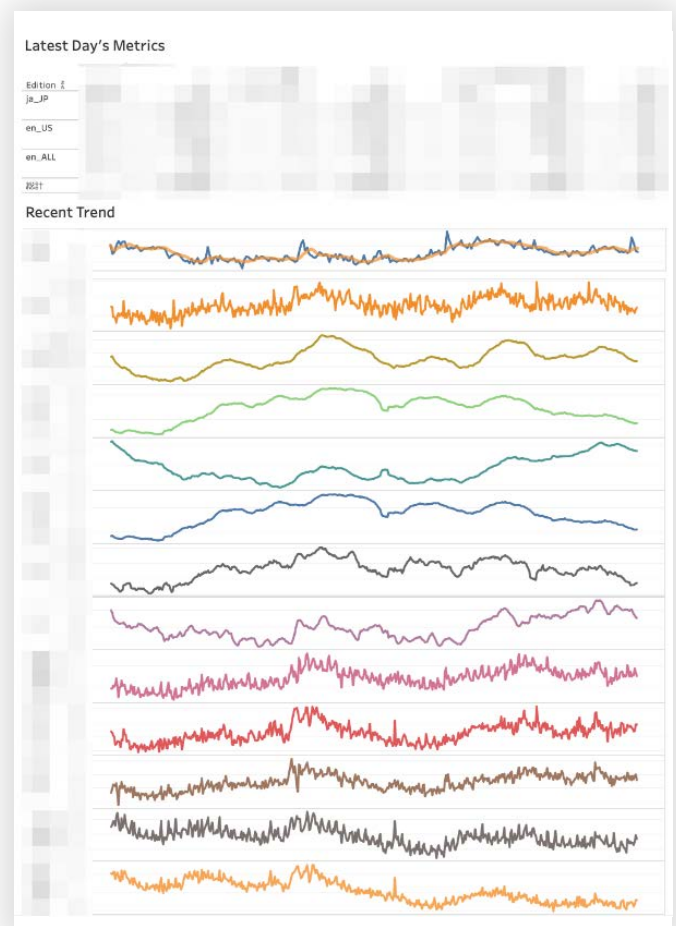
chose Tableau based on a holistic evaluation that included the fact that Tableau could be used with peace of mind, the richness of its functions, its look and feel, and its usability.

The migration phase was roughly four months long. Some of the company's existing forms issued complex queries, so the study took time. Three members of Li's team worked on the project full-time. They were joined by contract employees that assisted with the migration, forming a 20-person migration team. This team completed its project of migrating 3,000 forms used by the previous tool.

## Benefits of Deploying Tableau

### Retaining polished data

With the tool previously used by the company, the data logic and screen presentation were integrated. Because of that, expressing something required complex logic to be constantly running in the background. Tableau, on the other hand, excels at the simple extraction of data from data sources and its visualization.



“I feel like Tableau’s basic approach is similar to that of Excel,” says Li. Of course, Tableau is also capable of complex analysis, and it provides even greater performance through the attention it pays to the data source end. Tableau offers far superior expression capabilities, and comes with various expression formats by default. By retaining data in a polished form, it is able to provide users with the information they need in a more visual, easier to understand way than was possible before.

Being able to fully use its flow assists in this area. It has been well-received for just how easy it is to understand and its ability to efficiently prepare data. When users encounter specific issues as they use Tableau more extensively, or when they are unsure about how to visually express data, they can post questions to “Tableau Community,” a community of users. The community can often resolve these issues.

“Tableau is widely used, so it’s also possible to find solutions by Googling them. Of course, during any migration process, there will be some dissatisfaction until people get used to

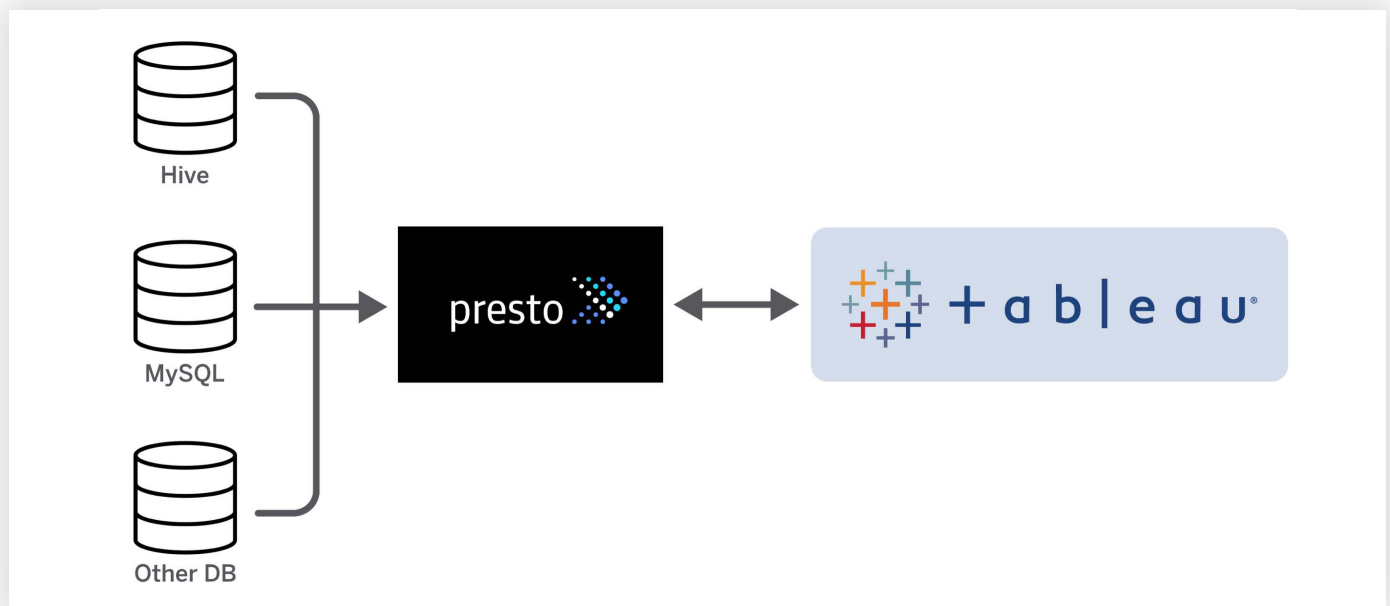
the new system, so there was some of that. However, some employees had been using Tableau at previous jobs, and many employees have an understanding of SQL, so people grew comfortable using it even faster than we had expected,” says Li.

#### Future Steps

### Solving storage problems and deepening use

The most pressing issue facing SmartNews is storage space. This problem is the result of the unexpected speed with which employees have taken up Tableau. At one point, 400 dashboards were created in a single week. The company is rapidly working to resolve this problem.

Getting users to use Tableau at an even deeper level is another major challenge. SmartNews is working to enhance its coordination with the Tableau Customer Success Team so that not only heavy users with Creator licenses, but also regular users with Viewer licenses, who can only view existing dashboards, are able to use Tableau more efficiently.



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<http://www.tableau.com/ja-jp/trial>

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