CASE STUDY

Asset management company uses self-serve analytics and enables customer 24/7 account information

A robust visual analytics platform helps firm segment multiple LOBs and support peak usage—at scale

A global asset management firm supports over 20 million investors worldwide. As an enthusiastic user of an on-premises implementation of Tableau's data visualization software, the company's IT leaders discovered that organic usage of Tableau had grown rapidly.

Increasing numbers of employees were adding use cases and accessing ever-expanding amounts of data. Core-based Tableau licenses were constantly being added, and eventually it became challenging to meet the demand for capacity.

At the same time, there was strong momentum for the company to move all of its line of business (LOB) applications to the cloud. The company had very specific needs for a cloud-based solution. It needed to scale globally and support peak usage scenarios, avoid excess costs, and add automation and redundancy. Critically, the company wanted to use a cloud-based solution to effectively segment and support a wide variety of LOBs.

The company hit pause to assess the situation, and began to consider a shift to Tableau's cloud option utilizing Amazon Web Services (AWS).

The decision to use Tableau and AWS

Every LOB in a Financial Services organization performs critical business functions such as Finance, Operations, Human Resources, or Sales. LOB apps usually contain a number of integrated capabilities and tie into database management systems. Adapting to rapidly evolving business requirements requires an agile response. As part of its move to modernize by moving to the cloud, the firm wanted to shift responsibility for its LOBs from IT to LOB administrators, who are closer to the unique rhythms and complexities of its internal business units.

The company recognized that Tableau on AWS offered the capability to realize a modern analytics platform while keeping data secure and compliant. The company moved its data visualization and analytics workloads from Tableau's on-premises environment to Tableau on AWS.

Tableau Server on Amazon Web Services (AWS) for Financial Services

- Enables insights across the enterprise—to enhance customer experience, mitigate risk, and help ensure regulatory compliance
- Segments and supports a wide variety of lines of business (LOBs) across diverse, global financial institutions
- Supports peak surges without sunk costs of on-premises hardware

Challenge

A global asset management firm needed a modern analytics platform that could be quickly deployed and scaled anywhere in the world, across many segmented LOBs, to support peak usage scenarios and reduce excess expenses.

Solution

Tableau Server on AWS was implemented across the enterprise. Scripted, interactor-based licensing accommodates peak workload surges, without the sunk cost of on-premises hardware. Multiple Tableau instances segment and support a variety of business leaders, particularly those supporting customer relationships, and enable Tableau deployment in anywhere in the world with just a few clicks.

Results

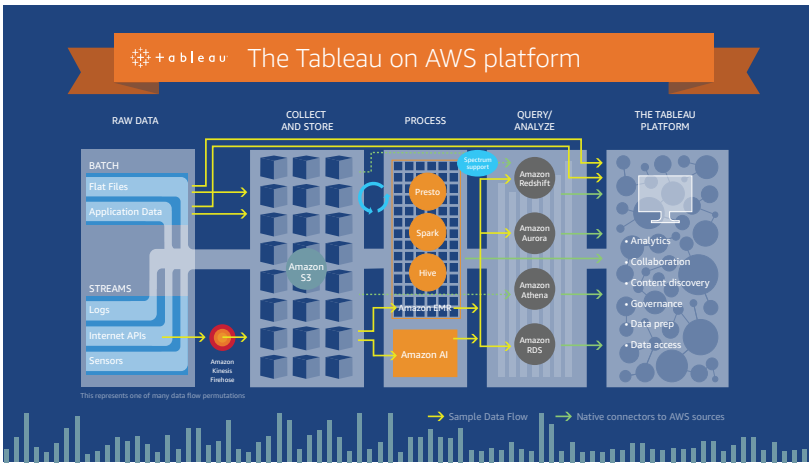
Today, the organization is able to:

- Dynamically add and remove Server Worker nodes to the Tableau Server Cluster to accommodate peak usage.
- Deploy Tableau anywhere in the world, avoiding the sunk costs of dedicated on-premises hardware.
- Support shared content, as well as segment separate LOBs, with multiple Tableau Server instances.
- Automate many functions that had previously been completed manually, requiring significant investments of time and resources.
- Provide client-facing account dashboards that are fully integrated into the company's retail website, powered by Tableau.

At the same time, the firm realized the value of providing dynamic, integrated dashboards to its large customer base via the retail website. Tableau visualizations were embedded seamlessly into the site, allowing customers 24/7, real-time access to their account information with the ability to analyze their account data easily to quickly find the information they were seeking.

The results: Data visualization built on AWS and Tableau

Today, the company can effectively segment each LOB using a cloud configuration with multiple instances of Tableau deployed. The company can publish shared content, as well as independent Interactor-based Server Instances deployed across different LOBs. Accomplishing this in an on-premises configuration would require a significant investment in fixed hardware.



Redundancy is built in to avoid failure downtime, and a variety of functions have been automated with scripts, such as:

- Adding nodes
- Backups
- Deployment configurations

Now the company can scale rapidly to deploy Tableau across the enterprise, connecting to large, high-velocity and diverse data sets for interactive analysis. Interactor-based licensing means that the company can use automated scripts to add and remove Server Worker nodes to the Tableau Server Cluster, without needing to invest in on-premises hardware.

Tableau: Helping people see and understand their data

To turn opportunities into reality, people need the power of data at their fingertips. Tableau is transforming the way people use data to solve problems by making analyzing data fast and easy, beautiful and useful. Tableau provides:

- Powerful analytics that drive business value.
- Fast adoption at scale across all skill sets.
- Flexibility to leverage existing technology investments.
- A mission-critical analytics platform that embraces both security and compliance.
- Centralized data sources, certified data sources, usage analysis, and permission controls to support data governance.

The benefits for the customer

AWS brings flexibility to enable this large asset manager to deploy Tableau across the enterprise, with built-in security and audit-friendly service features for compliance standards including PCI-DSS, ISO, and SOC.

Other benefits of the configuration include the following:

- Peak usage is accommodated with automatically added (and removed) Server Worker nodes.
- Tableau can be instantly deployed anywhere in the world.
- Dedicated hardware costs are avoided.
- Multiple Tableau instances support shared content and effectively segment LOBs from one other.
- Scripts can be used to automate functions such as adding nodes, backups, and deployment configurations.
- Reduces administrative workload on IT administrators and shifts responsibility to the LOB administrators closely involved in day-to-day nuances of their particular businesses.

ABOUT TABLEAU

Tableau is an enterprise analytics platform that enables your organization to explore trusted data in a secure and scalable environment. Give people access to intuitive visual analytics and interactive dashboards, and allow them to create timely ad-hoc analyses that reveal hidden opportunities and "eureka" moments alike. Get the security, governance, and management you require to confidently integrate Tableau into your business—on-premises or on the cloud—and deliver the power of true self-service analytics at scale. Learn more about Tableau on AWS.