Case Study

BUSINESS CHALLENGE
Complex data reporting system with limited data visualization, collaboration or real-time insight that led to reactive rather than predictive decision making.

SOLUTION
Comprehensive architecture and deployment of Microsoft Business Intelligence Platform incorporating SQL Server Data Warehouse, SharePoint, Excel, Power Pivot, Power View

RESULTS
Business managers now have more insight, more control, and more accountability in their decision making. Leveraging familiar tools such as Excel, with the built-in capabilities of Power Pivot, users can create interactive data, visualization and ad-hoc reporting. Plus, they can easily share real-time reports through SharePoint, creating an analytics-on-demand culture.

BlueGranite Helps AAA Allied Group Drive Self-Service BI Adoption

New data warehouse, SQL 2012 R2, Power Pivot technologies provide foundation for success

AAA Allied Group operates in 75 offices in seven states. While many people think only of its high-profile emergency roadside assistance business, each AAA organization also offers Insurance and Travel services. Additionally, AAA Allied Group provides Corporate Travel and Auto Repair services.

Due to the large membership and wide variety of services AAA Allied Group provides, it is often difficult to provide timely, accurate information and customer profiles and gather insights that could help generate additional sales or make the organization more profitable. Its data reporting infrastructure was a complex system that included several versions of Crystal Reports and over 1,000 Excel spreadsheet reports – all pushed monthly to users who rarely used them partly because they were out of date the minute they were distributed.

The sheer number of reports required costly storage and bandwidth. Additionally, the reports were static and did not provide business users the ability to manipulate and analyze data in new ways.

Rob Pickering, AAA Allied Group's vice president of IT, recognized the need for a ground up Business Intelligence initiative. He knew IT resources could be better used if his team didn't spend hours developing reports for business users.

He also learned many lessons from a two-year effort by marketing to launch executive dashboards. "The problem was trying to build reports from the top down – it doesn't work. We learned that we needed to look at the data first and build an infrastructure to support cohesive and meaningful reporting."
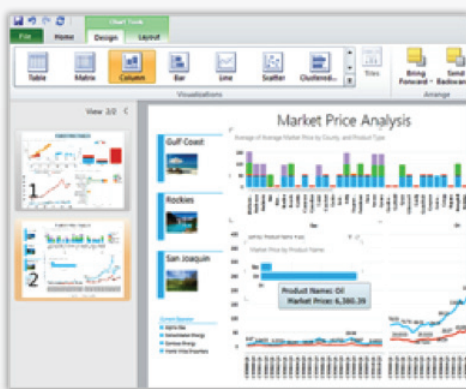
Pickering realized he needed different technology and a partner with Business Intelligence (BI) expertise, one that could help him build a centralized data warehouse, an efficient BI system, and drive user adoption.

"We recognized that Crystal Reports was not going to meet our business objectives and provide a comprehensive BI platform," Pickering said. "We are an all-Microsoft enterprise so we kept coming back to 'Why not build on the platform we already have?' Our end users and executives already know Excel and SharePoint and we can build upon licenses we already own."

After talking to colleagues at other AAA offices, Pickering met with a Microsoft team and hammered out a BI proof of concept as he considered upgrades to SharePoint and SQL Server. After attending a Microsoft event that featured Microsoft® Gold Certified Partner BlueGranite as a Business Intelligence subject matter expert, Pickering chose the Michigan-based National Systems Integrator as his BI partner.

"BlueGranite was highly recommended by the Microsoft team and had extensive real-world experience building and architecting BI solutions from the foundational infrastructure to dashboards to self-service delivery," said Pickering. "We knew they could support us as we matured through the BI lifecycle."

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Consolidate Disparate Data into Central Warehouse

As an initial step in the engagement, BlueGranite's team worked with AAA Allied Group to understand the business needs and assess the membership organization's existing data structure.
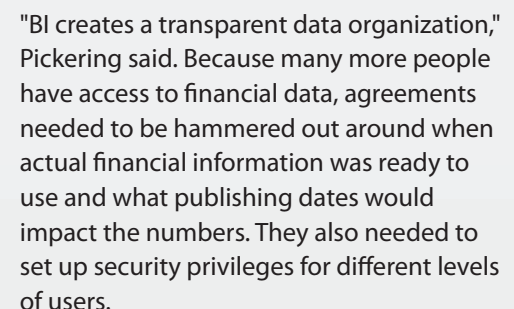
AAA Allied Group's business managers needed better insight into its customers, those that were members and those who were only buying ad-hoc services. Information on the two customer groups was buried in 10 to 15 different unconnected silos of business information used by its club membership, insurance, emergency road side assistance, leisure travel, corporate travel, and auto repair divisions, none of which shared data.

Managers, executives and a dedicated IT support team spent an inordinate amount of time collecting, organizing, interpreting information from the different systems, and then distributing data. "We had no single version of the truth about our customers," Pickering said.

BlueGranite set up a data warehouse using SQL Server 2012 Enterprise software, using SQL's Integration Services to extract data from business systems and load it into the data warehouse. To facilitate multidimensional data analysis, engineers created online analytical processing (OLAP) cubes with Microsoft SQL Server 2012 Analysis Services. The team also used SQL Server 2012 Reporting Services to create static reports.

Rather than distributing reports via email, BlueGranite set up a portal with Microsoft SharePoint Server 2010. The AAA Allied team manages who can view BI using permission levels within SharePoint Server.

Cultural Shift Key to BI Self Service Adoption

Pickering began the BI initiative with retail sales data, a choice that provided valuable insight and shaped the BI initiative going forward. "We quickly realized that for a lot of people, BI was going to be a cultural change," Pickering said. "The way people work is so ingrained that what they ended up doing with the new tools was using them to shortcut their previous process."

"BI creates a transparent data organization," Pickering said. Because many more people have access to financial data, agreements needed to be hammered out around when actual financial information was ready to use and what publishing dates would impact the numbers. They also needed to set up security privileges for different levels of users.

Managers collected the data and stuffed it into old reports; they didn't use the powerful tools to gather new data they could use to make additional models or gain deeper insights into what was happening in the retail outlets.

"When we went to the users to ask how they wanted to see the data, initially they weren't able to conceptualize beyond what they already knew," Pickering said. Through their extensive experience and in-depth technical knowledge, BlueGranite helped us create a different reality that gave business managers more insight, more control, and more accountability in their decision making."

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Taking into account what they learned, AAA Allied Group chose the finance department for a broader rollout. Allied Group's progressive CFO wanted to move finance to the BI platform so everyone could access the financial information he or she needed to run the company better. "Everything comes back to dollars," Pickering said. "If you start with finance, then everything else is so much easier."

Before implementing BI, the accounting team distributed financial information by publishing PDF files on a tightly controlled schedule. Managers could not drill down to get additional information, and often, the information was not current. Implementing the BI solution required a radical mindset shift for the accounting team, which had to relinquish some control.

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## Business Users Analyze Data to Drive Business, Allowing IT to Shift Priorities

Buoyed by the success of the BI rollout and user satisfaction, AAA Allied Group shifted IT resources to create an internal 3-member BI support team with on-going support from BlueGranite.

Executives are getting better insight into club membership, which drives 80 percent of its business and is the most complex. Deeper insight will come later this year as the BI team moves membership data to the data warehouse, making it accessible for everyone to learn more about their 1.5 million customers.

With wider access to financial numbers, executives can use actual numbers to react to situations quickly and make better predictive decisions. Business units can drill down into what is causing issues rather than just having a single picture of what's happening within their single business division.

With two divisions up and running with BI, BlueGranite is now holding workshops to teach Allied Group users how to use Microsoft BI tools such as Excel, Power Pivot, Power View and SharePoint to create their own custom data visualizations and reporting. BlueGranite workshops " allow users to learn how to create what they need themselves without needing huge IT support to generate reports," Pickering said. "We're teaching people how to interact with the data."

When fully deployed, Pickering expects 500 of AAA Allied Group's 1,800 employees will be active on BI. "With a comprehensive analytics platform in place, we can rapidly extend the environment to include additional business units," he said. "As the BI initiative grows, so does the value of the data. Our managers can't imagine running their divisions without it. "Thanks to our partnership with BlueGranite, we have shifted from making reactive business decisions to predictive ones, and from being static to being a dynamic organization."
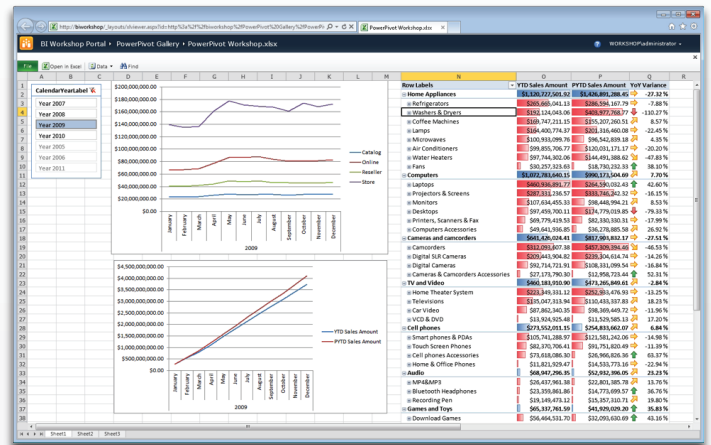
CONTACT US TODAY to discuss your organization's Business Intelligence and Modern Analytics needs. Call 877.817.0736 x701 or email info@blue-granite.com for a free consultation.

About BlueGranite

Founded in 1997, BlueGranite helps companies gain more value and insight from their business intelligence platforms using a portfolio of Microsoft tools. As an analytics consulting firm, we design data-driven support systems that help you acquire the insights you need to drive revenue growth. Whether you need to build a modern business analytics program, optimize your existing data warehouse and Microsoft SQL Server environment or explore new areas of self-service and mobile business intelligence, we can help. www.blue-granite.com