How to Choose and Deploy a Transformative BI Solution:

The Irish Life Story

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With 31 billion Euro under management, Irish Life Financial Services is the largest pension funds management company in Ireland. The company was also voted best life insurance company by brokers in both 2010 and 2011. Over the past five years, Irish Life has paid over a billion Euro in life insurance benefits to thousands of families.

In 2011, with four years of experience directing Irish Life's Business Intelligence Competency Centre, Senior IT Manager Paul Egan led the search for a new BI platform. This white paper explores the systematic process by which Egan and his team selected and deployed Tableau. Any company seeking better BI performance can learn from the comprehensive decision criteria Irish Life developed, the insights they gained during their search, the proof of concept they completed, and the lessons they learned during deployment.

Legacy Solution

The BI solution Irish Life purchased from a major vendor in 2006 had been roundly disappointing in terms of usability and performance. Five years later, the company was deeply frustrated by:

- Slow response times

- Dull, visually unappealing dashboards

- Inability to integrate with Active Directory security system (separate log-in required)

- Lack of email, web, or smart phone distribution options

They attempted a limited deployment of a new offering acquired by their provider, but it did not go well. Egan and his team determined that it was time for a whole new vision for BI at Irish Life.

Decision Criteria & Initial Search

Irish Life wanted to make business intelligence a core tool for decision-making. To achieve this goal, they needed a compelling BI solution that would be accessible to power business users with limited IT education, not just highly trained IT developers.

Egan's team developed five key criteria for identifying their ideal solution:

1. User friendly and easy to learn

2. Graphical presentation options

3. Ad hoc analysis and data discovery capabilities

4. Integration with Active Directory (security)

5. Seamless email, web, and smart phone strategy

"That's not a lot to ask for really," said Egan's boss, the head of IT at Irish Life, as they began their search—but the options were not immediately encouraging. Like many companies, Irish Life started by looking at solutions from established mega-vendors. Fortunately, they contacted Gartner, Inc., the highly respected global IT research and advisory firm, to validate their short list, and Gartner suggested they also consider alternatives to the traditional mega-vendors.

In their initial analysis of seven solutions, Egan's team found:

- Mega-vendor solutions did not deliver impressive visualization options.

- Mega-vendor solutions were not intuitive for business users with modest IT experience.

- Some mega-vendor options were compatible with existing technology infrastructure, but others would have required significant additional investment in other platforms from the same vendor to enable a successful deployment.

- Next-generation solutions were much more

visually compelling and easy to use.

- One solution was limited to analyzing in-memory data only, a potential barrier requiring continuous upgrading of memory to keep up with growth.

- Licensing options varied considerably in cost and clarity.

Proof of Concept

Following their initial search, Irish Life was already starting to favor Tableau, but they wanted to thoroughly test their decision. Egan decided to conduct a proof of concept comparing Tableau, the latest solution from their previous provider, and one other next-generation solution. The proof of concept focused on replicating existing reports and creating new ones with more visualizations.

To evaluate the proof of concept, Irish Life expanded their previous decision criteria to include:

- **Data definition layer.** They wanted a strong end user layer sitting on top of database schemas that would be easy to use and maintain.

- **Rapid development capability.** In addition to the ability to build new dashboards quickly, they wanted to be able to repurpose and adapt old ones iteratively.

- **Compelling usability and visualizations.** They needed ease of use and impressive presentations to help move BI to a more central place in the life of the business.

- **Performance.** They needed to be able to support 300 concurrent users during peak periods.

- **Ad hoc analysis and data discovery.** They wanted to empower business users to explore their own data and build their own reports.

- **Mail, web, and smart phone integration.** They needed a provider with a smart, flexible strategy that would support evolving distribution options.

- **Security.** They wanted to integrate with Active Directory and define roles limiting what data was accessible to each user

- **Cost.** They were willing to invest, but were "not particularly flush." They also wanted a clear licensing structure that would scale with their needs.

Tableau was the clear winner of the proof of concept. The solution from Irish Life's previous provider was deemed far too complex, the other next-generation solution was good, but Tableau was "absolutely superb." Both the IT team and the business power users that tested all three solutions agreed that Tableau offered all the benefits they desired:

- Easier to learn
- Easier to use
- Better functionality
- Better performance (works in-memory, but can also cache data in and out of any database)
- Better integration strategy (navigation and usability on smartphones is especially strong)
- Better licensing terms

Because Tableau was a virtual unknown in Ireland at the time, Irish Life took the additional step of validating their conclusions with Gartner. Egan spoke with one of the authors of Gartner's annual Magic Quadrant report for BI tools and reaffirmed the scoring results of all their short-listed solutions. Tableau had scored in the top three in every key area and number one in many of the most important categories, including Ease of Use and Overall Platform Success.

Making the Sale to Management

In taking his pitch for Tableau to Irish Life's senior management team, Egan focused on three differentiators:

" A couple of our business power users told me Tableau was the lightest touch software technology they had ever picked up and started to use. They were using it successfully within 30 minutes, which is quite astonishing. "

– Charles Boicey, Informatics Solution Architect, University of California Irvine Medical Center

- Ease of use rated highest by IT team, business power users, and Gartner analysts.

- Flexible server licensing model.

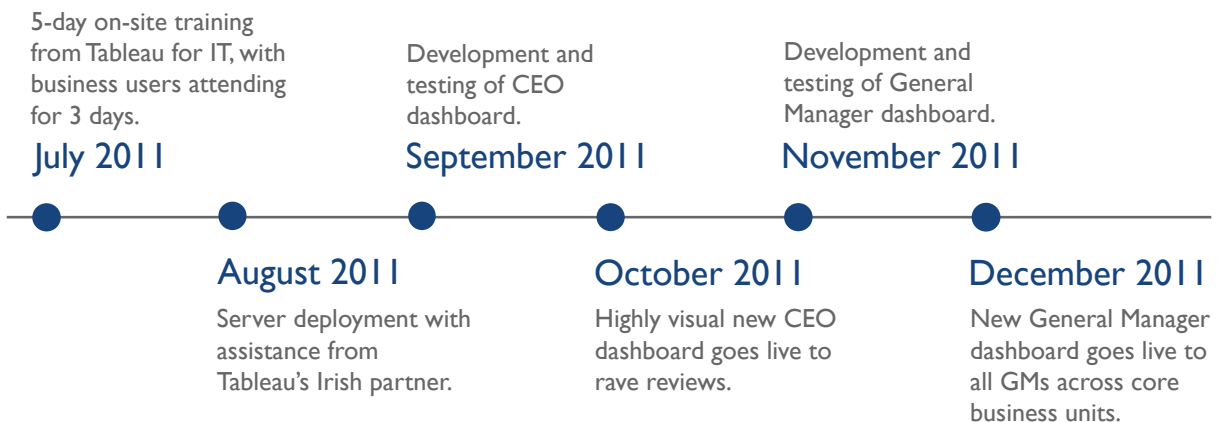- Exceptional ratings in the Gartner Magic Quadrant.

When asked to identify potential risks of choosing Tableau, he offered the following:

- **Not a traditional BI stack.** Tableau does not include ETL (extract, transform, and load) capabilities or underlying database technology. It is essentially an analysis, dashboarding, and presentation tool. However, it is much more flexible than traditional solutions because it is compatible with virtually any underlying database and can draw from multiple databases simultaneously.

- **New in Europe.** As of summer of 2011, Tableau was just beginning to build a support network for customers in Europe, but Irish Life worked with the first Tableau partner in Ireland during their proof of concept and was very satisfied with that relationship, which has been ongoing since that time.

Management agreed to the strategy, and Irish Life signed a contract with Tableau in June 2011.
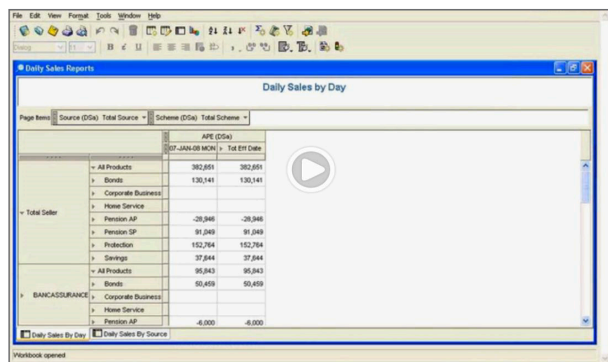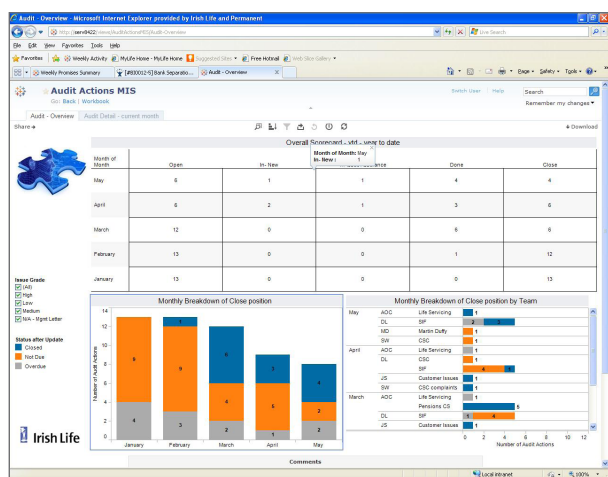
The new Irish Life BI platform included:

- 2 Tableau Server licenses installed on a virtual platform

- Capacity to support up to 300 concurrent users

- 40 Tableau Desktop licenses

- 48 GB of memory

- Excellent response times and no performance issues

- Single-sign on with Active Directory

- Dashboards secured to appropriate user groupings

- Additional row level security within dashboards (ex: see your sales channel, not others)

Perhaps most importantly, the new solution delivered a dramatic improvement in the quality and usability of Irish Life dashboards. "The new dashboards are colorful, they're visual—a picture paints a thousand words as they say," Egan explains. "There's less emphasis on the numbers, and it's very clear to see the trends and the pattern within the business."

Deployment Experience

Irish Life enjoyed a rapid and seamless implementation process:

5-day on-site training from Tableau for IT, with business users attending for 3 days.

July 2011

August 2011
Server deployment with assistance from Tableau's Irish partner.

Development and testing of CEO dashboard.

September 2011

October 2011
Highly visual new CEO dashboard goes live to rave reviews.

Development and testing of General Manager dashboard.

November 2011

December 2011
New General Manager dashboard goes live to all GMs across core business units.

Before

After

Lessons Learned

As a result of the transition to Tableau, Irish Life now enjoys a much more efficient business intelligence process, with far less time spent on accumulation of data and more time spent analyzing that data. Moreover, business users are taking control of exploring and analyzing their own data.

Agile BI Development Methodology

1. Identify business BI requirements.

2. Identify data to support requirements.

3. Create a reusable Tableau data source.

4. Do any ETL work necessary to make data available. This is minimal compared to their previous experience—just occasional extracts help minimize the overall volume of data going into memory.

5. Design and build dashboard.

6. Test and implement.

To support consistency, Irish Life has also developed best practice guidelines around:

- **Dashboard design.** Style guide, standards for position of logo, navigation, etc.

- **Data source standards.** Using local data is fine for exploration. However, if it's going to be used in a published dashboard, it should be moved to a production database where it can be backed up and kept consistent.

- **Strategy for non-production data.** If users insist on keeping data in Access or Excel, it should be moved to a secure area where its format cannot be changed without talking to the BI team.

Overall, Irish Life has been delighted with the superior capability and functionality that Tableau combines with a much lower learning curve than any competitor they evaluated. Tableau has also transformed the BI culture at Irish Life in three key areas.

- **BI is becoming a key decision driver.** "Tableau easily enables people to explore what is happening in their business and to use BI as a core tool to drive business decision-making."

- **Users are getting more out of their data.** "It's not just a dashboarding tool. We're getting more and more take-up of Tableau for people who actually want to work with, play with, and explore data."

- **Users are understanding and sharing data more effectively with visualizations.** "Visualizations really are the future of where BI is heading. With Tableau, Irish Life has actually begun to change the traditional mindset of actuaries and accountants away from being primarily numeric in orientation."

Going forward, Irish Life is excited to continue growing its BI platform, building the community of power users, and making BI an ever more integral part of its business.

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*.