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Case Study

**Credit Union SA – Customer Insights Platform**

Improving agility and customer focused reporting through a centralised data platform hosting self-service reporting tools.

# Credit Union SA – Customer Insights Platform

*Improving agility and customer insights reporting through a centralised data platform hosting self-service reporting tools.*

## Problem.

Smaller financial institutions, such as credit unions can leverage their size to make nimble, evidence-based decisions about the products and services valued by customers. But as with the large banks, they are also accountable to regulatory agencies' requests for information. These strategic, operational and governance obligations require the business to rely heavily on reporting for customer insights.

Credit Union SA is reliant on a small, mixed-discipline Data Analytics team to provide customer insights to their business and regulatory parties. All data requests are fed through this team. This is due to the methods used to store data, which are a mix of internal and vendor systems Customer insights require highly technical skillsets to extract the required information.

The data sources and their nuances are only well understood by the Data Analytics team, making the ability to allow business areas to develop reporting difficult. This is compounded by the different ways each system views a customer from a data perspective. Involving the Data Analytics team in all report creation impacts the timeliness and nimble responsiveness of taking action to improve services.

## Solved.

A Customer Insights Platform was developed to provide Credit Union SA a consolidated view of the customer portfolio. Leveraging Microsoft's Azure platform, the solution uses Azure Automation to appropriately control service access, generating a secure, valuable and scalable corporate asset with consistent entities across the different operational systems' reporting models.

The Customer Insights Platform provides a sematic layer of clear, well-defined data models which unify data sources and enable a holistic $360°$ view of the customer. These managed data models are certified by the existing Data Analytics team, then exposed to the Business in a governed manner. Subject matter experts now view the customer as it pertains to their products, services or interests, and understand other perspectives of the customer.

Through focused upskilling of the business areas and the implementation of Power BI as a governed analytics tool, the business is empowered with a Self Service Business Intelligence toolkit. Furthermore, the Data Analytics Team are empowered to refocus their energies toward providing further strategic value.

The improvement of historic data modelling allows users to explore the data models at a given point in time and not just the current view of a customer or loan.

## Business Benefits.

Credit Union SA can leverage business led reporting to help make informed changes to services, products and marketing that align to the changing needs of their customer base.

Business areas can begin to explore data in a less structured way than tabulated reports. Through the use of Power BI, a broader set of tools allow scenarios and slicing to help inform customer retention, product effectiveness, growth and marketing opportunities. As additional business areas use the Customer Insights Platform, the sharing of insights and evidence based decisions guides a more holistic view to guide and monitor the organisational strategy.

Staff have been empowered to independently gain insights through the Customer Insights Platform. This has reduced the reliance on a centralised reporting team. This provides timeliness of reporting, with inherent business area context including the varying perspectives of a customer.

The Data Analytics team can refocus from administrative reporting to high value analytics including further data integration and modelling. Data ownership becomes a partnership, where the business areas are more aware of the value of improved data capture, while Data Analytics continues to refine the semantic models provided back to the business.

**Agile Delivery ● Power BI ● Azure SQL Database ● Self-Hosted Integration Runtime ● Azure Automation ● Azure Data Factory ● Key Vault ● Training ● Governance**

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## Data Exposed

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**Do you have any additional questions, or want to know more?**

We would love to hear from you.

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