



Spotlight On IRISH LIFE

PAUL EGAN, IT MANAGER OF BUSINESS INTELLIGENCE

We caught up with Paul Egan, Irish Life's IT manager of business intelligence, at our 2012 Tableau European Customer Conference. He shared with us how Irish Life has committed to using Tableau to help manage its business in the midst of a worldwide economic recession. He described the spread of self-service business intelligence as a key element of helping business owners gain fast insight into the business. Not only is insight quick, but the implementation was live in less than two months. Irish Life is the market leader in Ireland for life, pension and investment plans—helping customers plan for their future with financial plans available through a 200-strong direct sales force, independent IBA & PIBA brokers, at a number of bank branches, and 175 franchises.



Irish Life

TABLEAU:

What's the main reason you're using Tableau at Irish Life?

PAUL:

Really it's all about showing visualizations and trend lines so people can see and understand patterns in the business. So, right across finance, HR, sales, customer service—all the metrics you need to run a successful business, track your customer satisfaction levels, your sales performance, and the stickiness of your business.

TABLEAU:

How did your implementation and roll-out go?

PAUL:

The rollout has been a tremendous success at Irish Life. It all went live in less than two months. The CEO had his new production-strength dashboards in Tableau in less than two months of the server being deployed—and that was a pretty incredible turnaround. We were trained at that time, deployed the server, and built the dashboards across a range of business metrics that the CEO in particular was interested in. And now, we're continuing to roll out new dashboards all the time for additional managers.

TABLEAU:

Do you see this sort of self-service BI changing the insurance industry?

PAUL:

The insurance industry has a reputation of being very traditional, staid, and conservative. That's not Tableau. The power of Tableau visualizations will be transformational, because it shows there is something beyond the numbers. Rather than searching for the message in the numbers, information comes straight at you—the visuals really paint information in a far more compelling and easily understood way. Tableau brings quicker, faster insight into where the underlying problems are within the business.

TABLEAU:

You started using Tableau Server in Dublin to share data country-wide?

PAUL:

Tableau Server gave us a production-strength IT platform with server publishing capability and Tableau Desktop gave us just a phenomenal dashboarding tool—it's very, very easy to build in. We wished to distribute information to regional sales managers and across the company far and wide.

TABLEAU:

How do people access the information you're sharing?

PAUL:

We publish dashboards onto Tableau Server knowing that every time the data is refreshed, real-time in some instances, people can come onto a platform that's fully integrated with security on our network. They log on, and any information they want is at their fingertips.

TABLEAU:

And what sort of data are you using?

PAUL:

We're a reasonably large life insurance company in terms of the Irish market. We have 1 million policy records and pensions—48 gig of

memory sitting on Tableau Server—all used within Tableau on a regular basis. That's an amazing capability to make that much data available for the development of interactive dashboards. Our data is predominantly stored in Oracle databases, Microsoft SQL Server databases, and we have some data for budgeting within Essbase.

TABLEAU:

Timely access to information is key to Irish Life's business strategy?

PAUL:

If we weren't able to see information within the data in a timely manner, we wouldn't be steering our business the best we could through these economic storms that have hit Ireland particularly hard. By investing in Tableau's BI capability, we're making a statement that Irish Life values information as the core driver for measuring and improving business performance.

“It's obviously a time of recession worldwide now, so it's ever more important that people can see trends very quickly, in a timely manner, with accurate, up-to-date information...”

“... that's what Tableau gives us”

TABLEAU:

Tell us how Tableau has impacted the scale of your BI team.

PAUL:

We have 35 business power users partnering with five IT people. We don't just have IT professionals building BI anymore. The extra strength in BI capability is fantastic because all those people familiar with their own data are now building their own dashboards—which we then publish right across the business.

TABLEAU:

What does the “extra strength” in BI mean to business?

PAUL:

Once upon a time, the businesses were queuing up looking for more and better dashboards. If our five IT people were busy, we couldn't meet additional need. The beauty of Tableau is that IT professionals do some of the under-the-hood heavy plumbing around the server, enabling data for Tableau, while the dashboards and all the BI is effectively done by business power users.

That means much greater synergy, much greater strength and depth across the organization in terms of delivering full, integrated BI solutions and delivering far more information for the management of the business.

TABLEAU:

Describe the impact on people who use Tableau for BI.

PAUL:

Many of those people in the past didn't actually have the information they wanted available to them or at their fingertips. Many of them did their own business intelligence using other small tools like Access or Excel, where they were working with maybe a local version, perhaps an out-of-date version of the data. They did their own onerous collating all the data and then perhaps mailing the output around the business. That was a very labor intensive way of distributing BI.

Nowadays, it comes out instantly; it's there even perhaps in real time—certainly first thing in the morning for the people who need to consume it directly off the server application. Those people who used to spend all day identifying the problems in the business now have all day to solve the problem or to develop new strategies for managing the business out of that difficult situation.

TABLEAU:

Why do you feel it's important to take BI outside the IT department?

PAUL:

Instead of just five people addressing the organization's BI needs, we now have 35 additional analysts. They're most familiar with the data; they understand what metrics they're particularly looking for within that data. So they're the people that build the dashboards. Now, IT can just concentrate on enabling the data and validating that the dashboards themselves are ready for publication and meeting our design standards and our test standards.

TABLEAU:

What sort of metrics are you tracking with Tableau?

PAUL:

In our customer service area, we have a large call center with a lot of customers calling Irish Life, and we survey their satisfaction at the end of telephone calls. We monitor the level of complaints and customer satisfaction. And we're collecting data on metrics for all Service Level Agreement (SLA) business processes. They're the first wave of metrics we're targeting with our Tableau deployment, and they're being received very well by the businesspeople who are partnering with us to build the dashboards.

TABLEAU:

What is the cultural shift you've witnessed at Irish Life due to Tableau?

PAUL:

I think we've certainly seen a seismic shift in appreciating the importance of a good foundation and the value of having better information flowing more freely across the business. More and more people are seeking information. They want to use Tableau to create that information, because they believe in the power of Tableau's visual capability. They actually believe in the importance of sourcing their data from authenticated sources that we're providing to the business. So, I'm very, very pleased to see that they've adopted very good principles around data management and visualization.