

ANALYTIC VIZION

From Reporting Bottlenecks to Business Users Building Their Own Reports

A transportation-focused financial technology company partnered with Analytic Vizion to enable self-service reporting, centralize executive access, and bring structure to its Tableau Cloud environment.

> *The biggest change wasn't the dashboards. It was giving business users the ability to answer their own questions without pulling the department lead away from other priorities.*
>
> **ANNA FOARD**
> **Consulting Lead, Analytic Vizion**

THE CHALLENGE

A transportation-focused financial technology company needed to meet growing reporting demands. Business users relied on a departmental lead to create reports, pulling him away from other priorities and making data exploration dependent on his availability.

The BI team faced a growing maintenance burden from duplicate dashboards, redundant data sources, and outdated content. Fragmented sales and operations reporting made it harder for executives to find the information they needed.

Without change, the company risked greater reporting dependency, with departmental and BI teams spending more time supporting routine requests and maintaining content instead of higher-value work.

TOOLS & TECHNOLOGY

- Tableau Cloud
- Tableau workbooks & dashboards
- Certified self-service data source and metric catalog

tableau from Salesforce

OUR APPROACH

Enable independent reporting
Working with BI and a departmental power user, Analytic Vizion clarified reporting needs and delivered a metric catalog, certified data source, and reusable templates.

Centralize departmental reports
The team consolidated dashboards and created a Tableau landing page, bringing sales and operations reporting into one location.

Establish repeatable governance
Together, the teams inventoried and tiered Tableau content, then consolidated, archived, or removed assets. Documented triage practices gave BI a process for ongoing management.

THE RESULTS

53 Workbooks Archived
Completed the defined archiving workstream as part of the broader Tableau Cloud cleanup.

Business Users Building Their Own Reports
Users can create reports with trusted resources instead of interrupting the departmental lead.

One Place for Executive Reporting
Executives can find departmental sales and operations reports in a central location.

Business users gained reporting independence, while the BI team gained an organized Tableau Cloud environment and a repeatable process for managing content as business needs evolve.