



POWERING AD-HOC ANALYTICS FROM OBIEE DATA WITH TABLEAU

A C A S E S T U D Y

Just two weeks into her new role as Sr. Marketing Analyst at a leading High Tech Company, Yun Fan was tasked to prepare the marketing analytics presentation for the Quarterly Business Review(QBR) with company executives. It was a great opportunity for Yun to showcase her marketing analytics expertise in the new organization.

But it was also a formidable assignment. The sales and marketing data resides in OBIEE which is difficult to use and lacks modern visualization. *“Ad-hoc analytics in OBIEE is quite a challenge and getting help from IT is not an option since their lead times are long,”* explained Yun.

Marketing Analytics at High Tech Company

With more than 2500 customers across 65 countries, the High Tech Company provides real-time cyber threat protection to enterprises and governments worldwide. Yun Fan is a member of the marketing analytics team that provides data driven insights and recommendations to improve the effectiveness of marketing operations.

Laborious Export/Import to Tableau

Yun took up the challenge to create QBR reports by using Tableau. Her manager helped extract the massive data set from

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Yun Fan, Sr. Marketing Analyst | High Tech Company

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several OBIEE subject areas. Just extraction took almost two days. Yun then had to spend another three to four days to clean up the data, import data into Tableau, recreate the joins, and develop visualizations for the QBR review. Yun presented a compelling QBR report, but she had spent bulk of her valuable time in the ETL process leaving her with little time for business analysis. Moreover, this was not a one-time project. *"I need to create marketing analytics reports almost on a daily basis for sales and marketing geo leaders. I realized that I needed a solution that will not require spending days preparing OBIEE data."* said Yun.

Not So Direct SQL Access

Yun's initial thought was to connect directly from Tableau to the database using SQL. However, it was not feasible because it required a time consuming process to get IT approval. *"IT would not approve because I would be by-passing the data security layers in OBIEE. Moreover, I would have to recreate all the meta data, joins, and business logic that has been created over the years. It would be a nightmare to maintain it all with constant changes in data model."* stated Yun. *"I tackle challenges all the time but this was impossible."* expressed Yun. That's when she reached out to the BI Connector team.

Rapid Analysis Powered by BI connector

In her previous role, Yun had evaluated BI Connector for connecting to OBIEE with Tableau. She liked the ease with which she could create Tableau dashboards with OBIEE data using BI connector. Because BI connector uses the existing OBIEE subject areas and security model without any changes, she didn't have to get IT approval. After discussing with her manager, she downloaded and tried BI connector.

Within a few minutes, she was able to create Tableau dashboards from the OBIEE subject areas. *"What would have consumed several days of my time in the past, I could now get it done within a few minutes or hours. BI connector provides the flexibility to create ad-hoc analysis without requiring technical expertise or IT help."* emphasized Yun.

Self-Service Marketing Analytics, Responsive Support

Since then, BI Connector has become an integral part of their Marketing Analytics Toolkit. *"I use BI Connector every day to analyze lead generation, opportunity analysis, conversion, and booking statistics. I share my dashboards with our global teams using Tableau Online. Geo leaders use my analytics in their executive presentations,"* remarked Yun.

She continued, *"The key benefit of BI Connector is that end users like myself can create beautiful ad-hoc reports from OBIEE data in minutes. By using BI Connector to create ad-hoc reports, we have saved weeks and months of user acceptance testing time that was necessary when reports were created by IT."*

"BI Connector works seamlessly in our environment. BI Connector team is quick to respond to my questions and even helped identify issues that were not in BI Connector." appreciates Yun, who is looking forward to use the BI Connector Reports Edition for ad-hoc analysis of OBIEE reports catalog with Tableau.

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