



# Not-for-profit financial services company uses analytics self-service and AI to optimize Snowflake investment using Avrio



## Case Study



## About Client

This enterprise is an American not-for-profit Fortune 500 financial services company headquartered in Minneapolis, Minnesota and Appleton, Wisconsin, that delivers solutions for banking, investments, insurance, and giving that enables its customers to achieve what matters most for them and their community.

## Business Challenges

### A scattered data environment and manual integration delays insights

The company faced analytics challenges due to the complexity of its data systems. Data for its most critical key performance indicators (KPIs) was scattered across several team systems and departments. Several of the more complex performance metrics required cross-system analysis, which resulted in delays due to manual data extraction. Teams needed up-to-the-minute reporting to make time-sensitive business decisions, but the reporting often took weeks, and the data was stale by the time stakeholders received it. And business users in several departments were requesting reports and asking for the ability to create their own reports in PowerBI rather than having to request and wait for custom reports.

The company's data was siloed in Snowflake and Delta Lake environments, and the company had generated multiple dashboards in PowerBI that it wanted consolidated. Since data had to be integrated manually from multiple sources, insights often took weeks to put together, delaying business decisions. Additionally, the current data infrastructure needed to be maintained, adding another draw on already scarce resources.

## The Avrio Solution

### Enabling analytics self-service and natural language AI queries

The company turned to Trianz, who conducted an analysis of the company's current dashboards, documented its KPI calculation logic, evaluated its data sources, and gathered its security and governance requirements.

To preserve the company's existing data investments and processes while adding a modernization layer, Trianz implemented Avrio, an AI-powered enterprise data platform. Instead of migrating the company's data sources, Trianz used Avrio's mirroring features to federate the company's data across sources.



The team connected to the company’s Snowflake environment and integrated directly with its Delta Lake files.

Once the data source configuration was in place, the Trianz team created a unified group dashboard, developed a business glossary in the company’s data catalog, established role-based governance rules, and set up user access. The company especially appreciated a new feature: the establishment of a data product marketplace, where business users could create, use, share, and combine their own data products with others in the company.

To transform the company’s analytics experience, the Trianz team helped migrate the company from PowerBI to Amazon QuickSight and enabled analytics self-service, so that all users could create the reports and dashboards they needed. Additionally, the solution empowered the company’s users to experiment with natural language queries to their data sets using AI, so that even non-technical users could query the data by asking questions such as, “what is the month-over-month change in sales in Latin America?”



## Results

### Optimizing Snowflake and empowering non-technical users

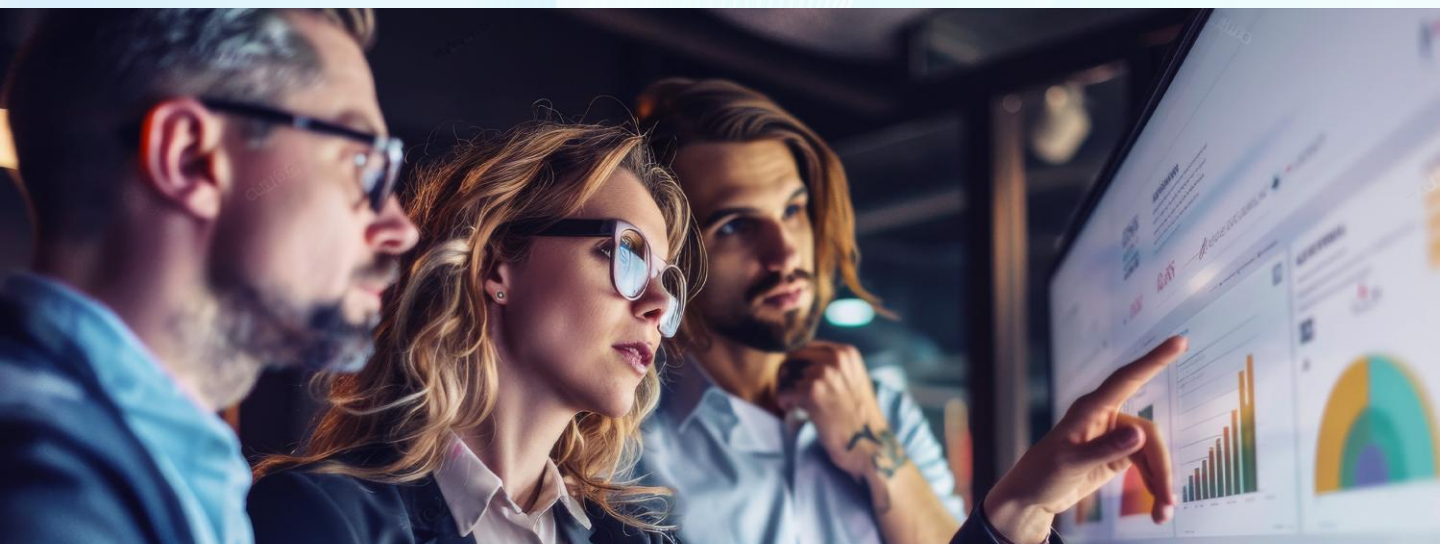
The company now enjoys real-time access to its KPIs as well as a unified view of its performance metrics, and its self-service analytics has moved BI ownership from a single team to every business user.

Avrio's data mirroring feature not only optimized the company’s data accessibility but also resulted in a reduction in Snowflake consumption costs by optimizing its current investment.

The company also saw benefits it hadn’t anticipated, such as non-technical users using the AI query to ask data-based questions and get access to data that had previously been unavailable to them.

## Executive summary

The company is an American not-for-profit Fortune 500 financial services company headquartered in Minneapolis, Minnesota and Appleton, Wisconsin, that delivers solutions for banking, investments, insurance, and giving. The company faced challenges with its data environment, which was scattered and required slow, manual processes for data extraction. The company turned to Trianz, who implemented Avrio, an AI-powered enterprise data platform, on top of the company's existing infrastructure. The solution not only served to optimize the company's existing Snowflake and Delta Lake architecture, but also enabled self-service analytics and AI queries for its users, reducing the burden on its IT department.



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