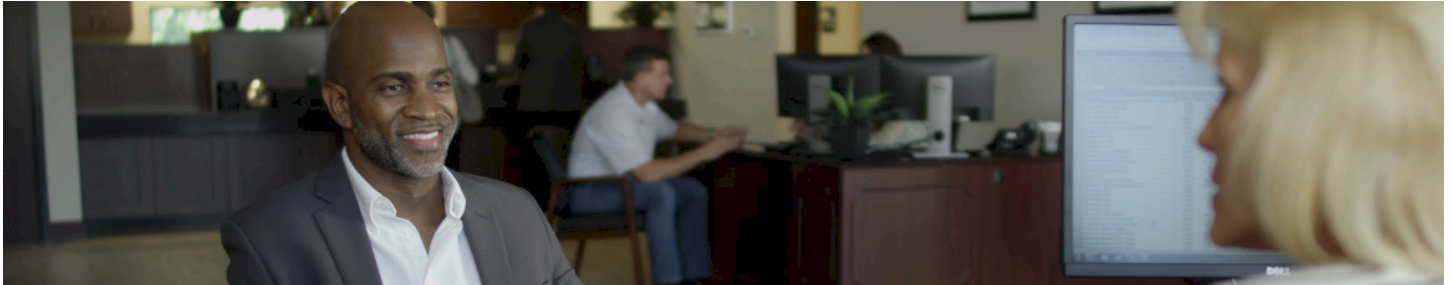


Client Engagement Summary

Credit union



DETAILS

INDUSTRY

Credit union

COMPANY SIZE

416 Employees

TAGS

Data Strategy
Data Governance
Dimensional Modeling
Azure Data Lake
Azure Synapse
Power BI
Symitar

CLIENT BACKGROUND:

This credit union is a \$1.8+ billion-dollar community-chartered credit union, serving members in 19 locations. They are a member-owned financial cooperative, and with the help of members and staff, they were recently rated as one of the top 100 credit unions in the country by Forbes.

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THE BUSINESS CHALLENGE:

The client began their data journey, creating a small data warehouse to combine and curate data, delivering reports to business users via Power BI. However, the process behind what goes into the data warehouse, how it is accessed, and ownership/buy-in across the credit union was not in place, creating a big gap in data strategy and data governance.

STRATEGY AND SOLUTION:

Baker Tilly Digital performed a strategic assessment, working with executive leaders, managers and analysts at the credit union to design a data strategy, data governance program and provide overall guidance for how the credit union should execute data analytics and business intelligence.

Baker Tilly Digital's approach included:

- Interviewing key stakeholders in all departments to identify business goals, key metrics, weaknesses and opportunities
- Evaluating systems and processes to map out key business process and data flows
- Assessing the skills and capabilities of staff to identify gaps of knowledge as it pertains to data and analytics
- Scoring and ranking key business metrics by business value and technical feasibility and visualizing on an opportunity matrix to show priority by business theme
- Designing a recommended technical architecture to support analytics initiatives for future state
- Creating a data governance program, tailored to the client, for determining the alignment of policies, requirements, roles and responsibilities around data management, privacy, security and access
- Forming a data analytics road map, specifying the phases of implementation, with timelines and estimates of effort

Baker Tilly Digital's data strategy and governance road map provided a clear path forward for the client to begin executing on prioritized data analytics initiatives, with a focus on better serving its members. Establishing a data strategy reinforced the need for an organized and governed single source of information that would solve many of the data-related challenges identified.

The data strategy will continue to foster growth of a data-driven culture throughout the business and support the credit union's mission of providing outstanding value and exceptional service to its members.