

From complexity to clarity: Alteryx optimizes nonprofit data workflows

New tech-based data infrastructure enhances efficiency and decision making

Key takeaways

1

A growing nonprofit organization faced issues with **increasing data volume and complex reporting**.

2

RSM created a custom Alteryx solution with **dynamic reporting** through Alteryx and Tableau Online.

3

Automation reduced data preparation time by **over 50% and improved operational efficiency**.

Overview

The automobile insurance residual market plays a crucial role in providing insurance to drivers who are unable to obtain coverage through the standard, voluntary market. However, companies in this booming market often face business execution hurdles, especially in terms of controlling costs, complying with regulatory requirements, maintaining market stability and integrating advanced technologies.

Background

Our client is a nonprofit organization that brings together automobile insurance residual market brokers and agents under a common mission and framework. As demand increased, they faced challenges with managing growing data volumes and complex reporting. These issues included:

- Time-consuming manual data workflows
- Installation and licensing issues with Alteryx in a nonpersistent virtual environment
- The need for automation of actuarial processes
- Underutilized Tableau dashboards due to static and inconsistent data feeds

Project

The organization understood the need to proactively address these issues and sought support from RSM. RSM's data and digital services team hit the ground running, developing customized solutions for seamless Alteryx integration, implementing dynamic reporting through Alteryx and Tableau Online, and establishing a robust data warehouse and business intelligence program.

The RSM team also conducted comprehensive training sessions to equip the organization's team with skills in actuarial science; Tableau and Alteryx; and optimized extract, transform and load workflows to reduce data preparation time. These processes enabled the organization to transform their complex data landscapes into streamlined solutions using Alteryx.

Outcomes

The impact of these solutions was significant, as the automation in actuarial processes reduced data preparation time by over 50%. As a result, our client improved business operations efficiency, established a more cost-effective use of Alteryx in a virtual environment and enhanced overall data quality through a robust reconciliation process.

This transformation empowered the organization to make stronger data-driven decisions, create a center of excellence and position RSM as a certified training provider.

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