

# BI Modernization Enabled a Leading Healthcare Delivery Network in the US to Make Rapid Decisions while Enhancing its Accessibility



## SITUATION

The customer had made significant investments in multiple Business Intelligence (BI) technologies such as MicroStrategy, Cognos, and Crystal reports. The inefficient technical and visualization architectures led to challenges in performance, data accuracy, and overall access to data owing to a complicated user interface and also resulted in low adoption rates

## IMPACT

In addition to incurring costs associated with maintaining multiple BI technologies, duplicate reports generated had a direct impact on operational performance. The business had little confidence in the data being reported as well as the ability of the existing BI infrastructure to support decision making

## RESOLUTION

The customer decided to adopt Tableau as their primary BI reporting technology across the enterprise. A conversion strategy encompassing architecture, tool capabilities, IT processes, and change management was defined and executed. Information and reporting assets developed in other legacy technologies were migrated to Tableau. The superior capabilities of Tableau were leveraged for modernizing the data delivery and decision-making infrastructure

## The Customer

A not-for-profit health system headquartered in California, the customer has eight physician foundations, 24 acute care hospitals, cancer centers, a regional home health, hospice organization, and long-term care centers. Cardiac care, women's and children's services, cancer care, orthopedics, etc., are some of the major lines of care that are being serviced by the customer.



## The Need

Consolidation of existing BI tools and defined reporting framework, process, technology architecture and governance needed to be aligned with the analytical needs of the customer. They were facing difficulties in driving decisions owing to poor access to data, redundancy of datasets, inefficient dashboard designs, and ineffective visualization capabilities. The customer identified Tableau as the choice of software to address their future BI needs. The customer wanted to perform a comprehensive assessment of their BI artefacts and capabilities before migrating them to the Tableau environment. This included identification of opportunities to streamline and simplify their existing BI landscape and define a cost-effective conversion approach.

## The Solution

ITC Infotech analyzed and converted a total of 700 plus MSTR reports across 24 projects available in the Microstrategy production environment. The Microstrategy Enterprise Manager was utilized to get a comprehensive list of documents, dashboards, cubes and reports, and identify underlying usage patterns. Each report was analyzed, and all its characteristic elements were identified and documented.

**A conversion strategy was proposed by segregating all existing assets into one of the following four categories-**

### Retire

It represents the number of reports that can be retired based on their usage statistics in last eight months as well number of errors while opening the reports.

### Rationalize

It represents the number of documents/dashboards that can be merged with another owing to similarity in design/information displayed.

### Re-Purpose

It represents the number of documents/dashboards that can be re-purposed as a pdf or some static/web document.

### Migrate

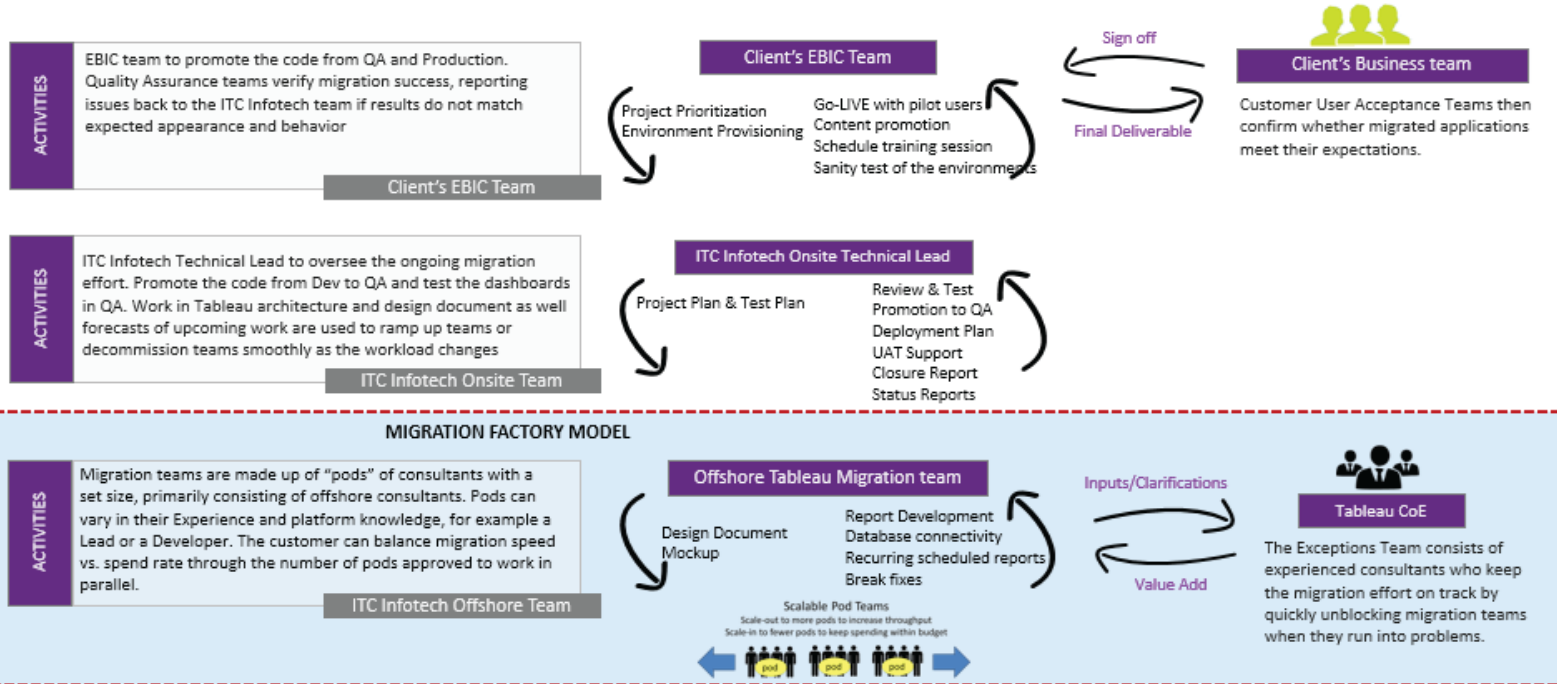
It represents the number of documents/dashboards to be migrated to the Tableau environment.

### Other value-additions delivered as part of the engagement:

- Proposed a high-level implementation roadmap using factory model implementations that provide a framework for planning and managing the migration of reports from MSTR to Tableau
- Provided a comprehensive view point by segmenting all the projects based on purpose and opportunity along with a clear view point on technical complexity, business value, and migration effort involved
- Proposed a phase by phase approach for conversion of reports to Tableau ensuring equitable distribution of complex reports across different phases
- Defined an operating model involving Tableau administration team, data services, and business users
- Custom designed a communication plan to involve all user groups in a planned phased manner along with a training and development plan
- Shared Tableau best practices and guidelines along with user roles and licensing requirements

# ITC Infotech Value Proposition – Migration Factory Model Execution

Bulk migrations are best served by a factory approach, in which similar applications and migration tasks can be made cookie-cutter and easily repeatable. In this model the “factory” are migration pod teams who make up the majority of the work force. The factory is supported by Client’s Health EBIC team and ITC Infotech Tableau CoE.



The aforementioned factory model was then employed to carry out the final conversion of reports to the Tableau environment, in a structured phase by phase manner. The Microstrategy environment was run in parallel for a predefined time and then retired on a project by project basis. The adoption of Tableau reports by the present users was facilitated by the proposed communication plan in which power users were first identified to enable easy adoption by the rest of the business users.

## Applications used in the solution included:

- Microstrategy
- Tableau

## Business Benefits

- Better performance using the Tableau dashboards owing to design and scalability for future expansion
- Enhanced user experience and increased competitive advantage with Tableau through better visualizations and generation of analytical insights
- Ability to make quick decisions owing to a consolidated BI tool for visualization and analysis
- Easier access to data by business users
- Standardization of EDW reporting owing to consistent UI experience

### ITC Infotech's Data - Infrastructure to Insights Practice

ITC Infotech provides Analytics, Big Data and Information Management services through its “Data – Infrastructure to Insights” line of business. Driven by strong leadership in domain and technology consulting, ITC Infotech provides modern solutions to help organizations harness the value of data. With a strong focus on design and differentiated delivery, ITC Infotech provides cost effective solutions, innovative offerings and customer delight.

In the areas of Healthcare, ITC Infotech focuses on Analytics and Business Intelligence solutions that help organizations provide superior quality of care, enhanced patient engagement, accurate regulatory reporting, and financial and operational excellence.

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