Tableau case study

The Client profile

The client is a premier mortgage company providing best-in-class residential mortgage lender services throughout the United States.

Once a small family-owned business, the company witnessed over 30-fold growth within a few years to become a leading mortgage player with a widespread footprint across the country.

Driven by their trio mission of simplicity, authenticity and transparency, the client is committed to simplifying the complexities of residential mortgage for their ever-expanding customer base.

Business Challenges

In the wake of their exponential growth, the mortgage company found it increasingly difficult to manage its reports manually using traditional excel sheets. Their high-end requirements necessitated a data-driven transition that automated their reporting system without disrupting the existing workflow. Predictably, the challenges were multifaceted.

- ⊙ An isolated reporting system that was difficult to manage

- ⊙ Limited data visibility

- ⊙ Tedious exchange of 200+ excel reports between the departments

- ⊙ No mechanism to ascertain the utility or necessity of these reports

- ⊙ The data was gathered from multiple sources, often with little or no correlation

- ⊙ The organization's reluctance in transitioning from traditional reporting to modern technology

- ⊙ Long hours of error-prone manual reporting

The opportunity

With our well-defined processes and years of expertise as well as knowledge with Datorama, we offered the company the opportunity to set-up a process to unify data from multiple data sources, built custom solutions to measure campaign performance, identify errors in the campaign strategy and easily share data with all advertisers without having to create individual dashboards for each of them.

Our approach

- We connected the various data sources through the various harmonization techniques available in Datorama and helped bring all these sources together. This enabled the reports to be generated within 20 mins saving a whole days work that could be spend elsewhere and were available within a few clicks with basic insights.

- We developed a custom solution using various statistical tools to access the 'Lift' a campaign bring in towards the Conversions. Another Solution called 'Geo Suppression' was developed for A/B testing the campaigns/creatives for different states.We also built image recognition tools to analyze customer perception towards various Creatives. This helped in designing better user friendly creatives for the upcoming campaigns.

- We went a step ahead of pacing analysis which notified the client on how the campaign was performing and solved one of the most common issues – Campaign flight mismatch. The original plan for the campaign had changed without the changes being updated in the system. We built a process that would automatically adjust the Dates still excluding the irrelevant data set.

- We passed URL parameters to filter the Dashboard. But that allowed curious advertisers an opportunity to tweak the parameters passed to see another advertiser's data. Although Datorama does not support URL Parameters, we have an option to pass values to an interactive filter through the URL. We used our skills in HTML/CSS to hide the interactive filter widget from plain sight To further solve the issues brought in by curios analysts, we encrypted the value in the parameters and ensured the system decodes the data before being read.

- To add more value, we provided insights on the Dashboard based on the campaign stages. Also, we built an application to generate a PPT that provided a Deep-dive on the campaign performance which was available within a click!

The Results

With the solution brought forward by us, using Datorama to collect data, setting up documentation and process for quality analysis and regular checks for campaign tracking, we were able to attain highest levels of data quality.

The client is now able to ensure data quality across all their marketing campaigns and notices added value through the solution brought forward to reduce time spent on process and increased accuracy. They can present their value with data, that is readily accessible and accurate.

The client has re-allocated their budget based on their campaign performance at the most granular level for increased ROI

These developments have helped them take the next steps by collecting more data and move into the newer fields of Data Science.

Nabler is a Digital Analytics company.
We help enterprises and media agencies analyse digital data to better understand customer behaviour and enable revenue driving decisions. Founded in 2004 with offices in Bangalore, Charlotte and Denver, we have advised some of the top global brands, media agencies and Fortune 500 companies.

CSAT Score

8.9 / 10

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