



Spotlight On

FIRST CHOICE

POWER



LLOYD TOKERUD, ANALYTICS MANAGER

A certified Texas electric company since 2001, First Choice Power has been around since the start of deregulation in January of 2002. Their Texas roots run much deeper with a 70-year heritage of serving Texans as the retail Texas electric provider of Texas New Mexico Power. At the 2011 U.S. Tableau Customer Conference, analytics manager Lloyd Tokerud chatted with us about how Tableau is helping First Choice Power not only master reporting processes and analyze a wide variety of data sources, but also make vital and strategic business decisions.

TABLEAU:

What made Tableau stand out for First Choice?

LLOYD:

Our company started off a couple of years ago trying to pull together a centralized data warehouse off of multiple large transaction-based data systems. They looked for a reporting software package to sit on top of that data warehouse. Tableau's ease of use, the ability to visualize information, and the fact it didn't require a PhD to operate, let us know we could teach analysts how to use it with very little training.

TABLEAU:

What kind of data are you working with?

LLOYD:

The deregulated energy market is interesting from a data perspective, because it's deregulated, but some elements are still regulated by the state. So, it's a real jumble of information, some you can get to, some you're not allowed to get to—data is a really big part of being able to compete.

TABLEAU:

Where is your data located?

LLOYD:

The transactional-based data systems where we've housed all of our data were built for, you know, doing things like issuing a bill-to, right? Not really designed for reporting. So, it took a SQL PhD to be able to go into that system, tie together all these tables, and then produce something that's actually meaningful to the executive team.

TABLEAU:

So you used Tableau as a reporting tool?

LLOYD:

When we first started the Tableau implementation, we used it primarily to replicate some of the very exhaustive, painful reporting practices that we had just for the operations team. We wanted to be able to just be able to pull up the data as needed on a daily basis when it was refreshed, and very quickly answer questions off of it.

TABLEAU:

Did you leverage any of Tableau's other capabilities?

LLOYD:

When we first signed up with using Tableau, the initial value that we had to it was the ability to post reports to the web. The self-service reporting model was great, got us out of the business of doing all that stuff manually.

As we started to pull together data from multiple transaction systems, we were able to start doing things for marketing and sales, which made the difference in how they approached the business strategically.

We started going into live meetings with executives and doing drill-down analysis right on the spot and solving a business problem right there. That's what really got people excited, and that's what became powerful for us.

TABLEAU:

What has been Tableau's biggest impact on the company?

LLOYD:

I think that the biggest impact that Tableau has had on the organization has been speed of decisioning. What was once a four or five-week journey of solving a business problem got collapsed into one hour. We get in the room with executives; we have a business problem on the table. We go through whatever data elements we need to in order to solve it, and we leave the room with a decision.

TABLEAU:

What sort of insight does Tableau help you unlock?

LLOYD:

We're we're really trying to get to is more understanding of how customers behave. By being able to see patterns in our customer transactional data and tie it all together, we can understand what behaviors led up to a certain customer leaving, or what makes our good customers stick. We can also take that information, go external, and append that with some demographic information to get smarter about our marketing efforts to try to go after good customers.

“Tableau really is so easy to use. Our analysts pick it up within a couple of hours; our end users pick it up within 10 or 15 minutes.”

TABLEAU:

How has Tableau impacted you personally?

LLOYD:

A real benefit of Tableau has been in helping me transform from someone who is more a purely business-oriented person into more this hybrid business IT person.

When I started out on this role, I came from more of a finance background. I was more the business user who had a strong IT bend but not really purely IT. As I got into this, I had some trepidations about my ability to understand some of the more hard-core languages like SQL or SaaS and rip data from a live data warehouse.

But Tableau essentially bridged that gap for me. I very quickly was able to understand Tableau and use Tableau to start to speak the same language that my development team did. So, for me personally it's been a great catalyst from getting from the business world into this hybrid business IT world where the BI space is today.

TABLEAU:

What is the speed of implementation with Tableau?

LLOYD:

It's great. Not only for the reporting, but it actually is a catalyst when you're trying to put together a centralized data warehouse for all of its quality control capabilities. It really speeds up the development time and being able to make sense of how you're building your warehouse and where you need to go next.

TABLEAU:

Do you use Tableau for self-service analytics?

LLOYD:

Our team is basically structured as a centralized analytics group. We pulled people from different parts of the organization that were doing their own reporting into one group to be able to sort of monitor, police, control what's going on with data. That's great from a quality of data perspective, but it's really challenging from a workflow perspective, because all these customers throughout the organization are requiring things from you that you don't have enough time to fulfill. So, as much as you can, being able to push some of that stuff out so people can answer their own questions with simple queries or reports is a great benefit to free up the analytics team to do the really important stuff that the executive leadership level is wanting them to do.

TABLEAU:

What would you say to others contemplating Tableau?

LLOYD:

It's a very powerful tool to be able to use with business partners in the organization to be able to say, "You've got a business problem, I've got the data, let's get together and try to hammer out what the right element is here to solve your business problems and to move the business forward."

That's really where the power of Tableau can really accelerate the business.

Tableau Software helps people see and understand data.
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