



AAA Carolinas Completely Functional with Brio in One Week

Quick Payback on Investment, Increasing Revenue and Profitability with Member Centric Analysis and Reporting

Table of Contents

<ul style="list-style-type: none">● Executive Summary● The Situation● The Need	<ul style="list-style-type: none">● The Solution● The Results
--	--

Executive Summary

AAA Carolinas deployed the Brio Decision Platform to access its newly constructed SQL Server data warehouse containing 15 gigabytes of member data from four functional, transactional systems. AAA Carolinas selected Brio for the strength of the Web-based solution, ease of use for both IT staff and business managers, and the "pivot" function which allows rows and columns to be instantaneously swapped with one movement of the mouse. Brio was deployed quickly, giving decision-makers access to data previously unavailable. According to Maryanne Rayfield, AAA Carolinas CIO, " Decision makers are now able to minimize the risk of making new decisions by basing them on real time use of dynamic analytics."

The Situation

An affiliate of the American Automobile Association, AAA Carolinas is a not-for-profit organization serving over 1.3 million North Carolina and South Carolina members with travel, financial, insurance and auto-related services. With 700 employees, 26 offices, and four distinct lines of business, AAA Carolinas

generates annual revenue of \$50-\$100 million. Facing competition from travel agencies, insurance companies, and roadside assistance service providers, AAA Carolinas needed to implement a robust, yet easy to use business intelligence solution for decision makers throughout the organization.

AAA Carolinas needed a business intelligence (BI) solution to complement a new data warehouse that integrates data from four distinct transaction systems (travel, membership, insurance, Web). Prior to this initiative, data and reports were generated from OLTP data by the IT staff and delivered to users either in Microsoft Excel pivot tables or in reports generated from SQL queries. Reporting was constrained by both IT resources and limitations in Excel functionality. Projects to deliver analytical reports were frequently prioritized below other projects. Users had no self-serve reporting capabilities and had no choice but to wait for IT resources to become available.

The Need

The critical requirements for the BI solution were seamless integration with the data warehouse, the accommodation of large data stores, and the ability for the end users to easily create queries and reports on their own. Another key consideration was cost. The warehousing project was already expensive and the IT team wanted to deploy a proven BI solution at a reasonable cost.

The data warehouse steering committee, comprised of four executives, two IT staff and four business line managers, led the selection process for the BI solution. In order to shorten the process and minimize committee workload, they brought in a consultant, Osprey Systems, to create a comparative analysis of all BI vendors. From that information, the steering committee quickly created a short list from which to do further in-depth analysis and product testing.

The Solution

Brio was selected based on the strength of its Web-based solution, ease of use for both IT staff and business managers, the "pivot" function which allows rows and columns to be instantaneously swapped with one movement of the mouse, and the speed with which it can be deployed. The IT staff uses Brio client/server products while remote business managers use Brio Web products.

The Brio Enterprise Decision Platform accesses a Microsoft SQL Server data warehouse. Informatica's mapping tool is used to pull data from the various transaction systems and load it into the data warehouse. This 15-gigabyte warehouse contains customer data ranging from travel reservation history, membership history, insurance product sales and Web click streams. IT staff, business managers and executives regularly access the warehouse.

AAA Carolinas uses the Brio Broadcast Server to schedule large, complex queries and reports to run overnight so users have their results when they arrive in the morning. Both IT and user created reports are stored on a central server for others to either view or modify for their own use.

An unplanned use of the Brio solution is that 50% of the queries access transactional data in addition to warehouse data. Many queries require fresh transaction data in addition to monthly warehouse data. Brio makes that task surprisingly simple. A single query accesses all the required databases and combines results into one report for further analysis and distribution.

In addition to the "typical" business intelligence use of Brio, AAA Carolinas is using Brio to test and refine their data warehouse. Brio is gathering data from both the warehouse and operational systems to see if data is loading accurately. This feature has saved countless hours and allowed the warehouse to go into production sooner than expected.

AAA Carolinas got a "jump start" on their Brio implementation by using Brio's Professional Services to perform the initial installation, train the IT staff, and write initial queries and reports. In just one week, AAA Carolinas was completely functional with Brio. Since then, they've used Brio's Computer Based Training courses to advance the IT team's Brio proficiency and train end users.

The Results

Brio was immediately used to increase profitability on membership activities. An important membership renewal test was completely evaluated with Brio reports. One group of members was sent membership renewal invoices with new membership cards enclosed. The other group received an invoice without a new card. (New magnetic stripe cards aren't required annually) In less than two hours, a complex query and companion report was created to measure the results. Brio reports revealed that there was very little difference in response. AAA Carolinas is now saving hundreds of thousands of dollars each year by not producing and mailing unnecessary cards.

Another quick payback on the investment in Brio was to merge membership data with population density data to determine the best location for a new office. In less than several hours, a query was written to pull current members by zip code, import that data into Map Point, and within a few clicks, AAA Carolinas had a graphical representation of member concentration compared to population density. It was then visually easy to see where the new facility would best serve both current and future members. The business line managers can now do this analysis on their own, without further assistance from IT.

The IT staff is enjoying increased productivity since the deployment of Brio. They spend about the same amount of time writing queries and reports - but with Brio, they are able to process many more in the same time. User satisfaction increased with the faster turn-around time. Prior to Brio, it was a common practice for IT to write a query and generate results, key it into email, and then send the information to requestors. Now, IT creates a Brio document, posts it to the report server, and sends the requestor a link to the document.

Remote decision-makers are far more satisfied with their reports and their improved ability to make data-driven decisions. Sales reports are on-line along with results of direct mail campaigns and other initiatives concerning all AAA Carolinas offices. More managers are involved in the decision process and can track key performance indicators.

Probably the greatest gain will come from AAA Carolinas new ability to look at all facets of its members. Databases and analyses are no longer stove-piped by whether members use travel services, roadside assistance or insurance. Instead, a complete analytical view of members provides additional opportunities for targeted marketing campaigns, increased revenue and improved member satisfaction. For instance, if a member has called about cruises and visits the cruise section of the Web site, AAA Carolinas can now integrate both pieces of information and send the member a cruise-specific direct mail offer. The member knows AAA Carolinas is paying attention to their needs and increased revenue will result.

Maryanne Rayfield, Chief Information Officer for AAA Carolinas, was contacted by phone on August 15, 2001 to verify this case.

Wendy Steier, Senior Account Executive, Text 100 Public Relations, gave permission to use this case study at DSSResources.COM on Wednesday, July 25, 2001. The case was originally posted at the Brio Technology web site. For more information check <http://brio.com>. Posted August 15, 2001.

Brio Staff, "AAA Carolinas Completely Functional with Brio in One Week", Brio, Inc., July 2001, URL DSSResources.COM.