

ANALYTICS

Qlik empowers company-wide insights

A simplified UX turns Intuit into a more
data-driven company



CUSTOMER STORY

“Embedded analytics helps organizations empower employees with the information they need, right where they need it. Compiling everything into a single web platform is something no other BI tool could do.”

Aaron Growitz, Group Manager, Business Intelligence and Data Visualization, Intuit

A complex data picture was difficult to navigate

Intuit is a global technology platform that helps consumers and small businesses overcome their most important financial challenges. Its 14,200 employees serve more than 100 million customers worldwide through such products as TurboTax, QuickBooks, Mint, Credit Karma, and Mailchimp.

For a company of this scale, with so many products and constant technological innovation, Intuit’s data picture was complex—so complex that it was difficult to attain company-wide metrics. They used many different data sources, and there weren’t consistent definitions or metrics.

Intuit used QlikView to its full capacity, having established 4,000 dashboards. But the complexity of their data setup put a high cognitive load on employees. And because analytics were not automatically updated across various platforms, leaders got reports and gave presentations using information that wasn’t always up to date. “During certain performance reviews or operating meetings, PowerPoint serves its purpose, but when it came to the idea of uniting Intuit as a data-driven culture, the PowerPoint deck really couldn’t facilitate that,” says Intuit Group Manager of Business Intelligence and Data Visualization, Aaron Growitz.

It was time for Intuit to rationalize its data infrastructure and simplify the internal user experience of data analytics using Qlik Sense.

An easy-to-use portal puts data in the right place

Intuit’s finance team took on the challenge of creating a

Solution Overview

Customer Name

Intuit

Industry

Financial Services

Geography

USA

Function

Finance

Business Value Driver

Reimagined Processes

Challenges

- Leaders built presentations around slide decks with outdated data
- Disparate data sources meant there were no cohesive company-wide metrics
- A difficult-to-navigate, confusing array of visualizations

Solution

Using Qlik Sense to create a web-based embedded analytics portal for all of Intuit

Results

- Widespread adoption thanks to a friendly UI
- Increased accountability on company-wide metrics
- Embedded analytics create a single source of data truth across platforms
- Developed open, modern API-rich platform

web-based portal to provide the company-wide metrics Intuit identified as supporting its mission and True North goals. Using this framework, backed by Qlik Sense APIs, they could host real-time data across multiple applications through a modern web experience.

Within Intuit's new data analytics architecture, data from both Qlik Sense and other third-party sources like AWS flow into the One Intuit Portal through Qlik Sense's API integrations. The APIs also create reusable components that can serve as embedded analytics. Intuit's end users then consume the data via a single-page application on the React framework.

The embedded analytics that Qlik Sense's APIs enable are a game-changer. Embedded analytics seamlessly integrate analytic content into other business products, websites and applications. "It's all about enabling different simpler experiences through some of our extensions or navigation mashups," Growitz says. "The idea of just using that left-hand navigation and pulling in a bunch of information outside of BI tools into a web framework took off really well." Intuit's VP of Data and Analytics said, "It makes a massive difference for those that live in this dashboard."

Widespread adoption means a more data-driven company

Growitz notes that being data-driven is not only showing data. "It's about centralizing the data, making it more usable and presentable to everyone at Intuit." At Intuit, each of their offerings have targets to hit by year-end. These metrics are tracked in the One Intuit Portal and leaders are strongly encouraged to provide commentary on their progress. In this way, the data from Intuit's portal drives action and accountability.

Thanks to embedded analytics, presentations and reports are now always based on real-time data. Intuit's users don't have to worry about the original data source or how a metric is defined—definitions are the same across the company. That's the benefit of having a single source of truth.

Where users once had to navigate a complex landscape of dashboards, the One Intuit Portal is much simpler to use, which is a large part of its success. The popularity of the reusable components took even Growitz and his team by surprise. The ease with which users can modify dashboards—no coding knowledge required—is a huge benefit. "Everyone's actually happy to be reusing the components; we didn't even try to push it," he says. "People would try to build something themselves and it would take them weeks. And then they see they can just

drag and drop this in here, which is a lot easier. That helped gain adoption, and the consistency of that UI and UX across the company is pretty helpful." Today, the portal has around 1,300 monthly active users—a third of the company.

Putting the time into making complex data analytics easy to consume pays dividends. Growitz notes that Intuit didn't have to provide user training for the portal. "Once people saw the ease and consistency of the UI and UX, it took off," he says. Intuit always valued data, but now it is a more data-driven company with a modern, accessible approach. Over the past two years, usage has grown 10x for the embedded analytics the team supports.

The keys to success



1,300 monthly active users of their dashboards



1/3rd of company uses Qlik portal

“None of this would have been possible without Qlik Sense’s APIs, which enable you to customize analytics solutions and embed fully interactive analytics within the applications people use every day.”

Aaron Growitz, Group Manager, Business Intelligence and Data Visualization, Intuit



About Qlik

Qlik’s vision is a data-literate world, where everyone can use data and analytics to improve decision-making and solve their most challenging problems. Qlik offers real-time data integration and analytics solutions, powered by Qlik Cloud, to close the gaps between data, insights and action. By transforming data into Active Intelligence, businesses can drive better decisions, improve revenue and profitability, and optimize customer relationships. Qlik serves more than 38,000 active customers in over 100 countries.

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