

# The Alzheimer's Association Seeks Fix for Data Dilemma

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*-FRANK GARZA, Director of Strategy and Analytics*

The Alzheimer's Association is the leading voluntary health organization in Alzheimer's care, support and research. To enhance and strengthen this leadership position, the Association's strategic plan supports a bold 10-year vision for the Alzheimer's disease movement, setting clear milestones to accelerate progress. The Association identified five strategic areas — increasing concern and awareness, advancing public policy, enhancing care and support, accelerating research and growing revenue — to prioritize and implement throughout the organization.

As Director of Strategy and Analytics, Frank Garza is responsible for measuring the progress of the Association, which includes more than 80 chapters across the country.

## Data Dilemma

As the current Association's strategic plan was rolled out, Garza and his team were tracking key indicators without access to a data warehouse. In fact, they were relying on 14 different data sources.

The time-consuming process of extracting data from unwieldy Microsoft Excel and Access databases hampered Frank and his team. The source data sets were often challenging to work with and cumbersome, leading to delays in reporting — in some cases, up to 45 days after the close of a quarter.

In order to efficiently monitor progress and troubleshoot any issues, Frank knew his team needed a more effective process for reporting data. He began to look for a better solution.

## Staying On Track

After attending the 2015 Tableau Conference, Frank was introduced to — and eventually engaged — Icimo Analytics by Cherry Bekaert. The Firm worked with Garza's team to understand the Association's priorities and build out Tableau dashboards that would enable more accurate and efficient progress tracking of the strategic plan.

Frank was initially struck by Icimo Analytics by Cherry Bekaert's clear understanding of what The Alzheimer's Association was trying to accomplish.

"From our initial training session, it was clear that the Icimo Analytics by Cherry Bekaert's team was focused on our big picture goals," he said. "They were not here to simply upsell us on more software solutions. Rather, it was obvious that they were in this to succeed with us. They worked with us as partners, and were committed to understanding our data and what it meant to our strategic plan and overall organization."

## Insight, Efficiency, Accuracy

Frank has observed several noticeable improvements since working with Icimo Analytics by Cherry Bekaert.

Frank also reports that the Tableau implementation has freed up 70 percent of a key team member's time. Instead of spending hours extracting and organizing data, she now has time to focus on other critical projects. Icimo Analytics by Cherry Bekaert also recommended new dashboards for Frank and his team, which Frank then adopted, including:

- ▶ A gap analysis to quickly determine which chapters are performing at a high level related to the strategic-plan milestones and which chapters need additional assistance.
- ▶ A revenue analysis that summarizes how different regions and chapters are performing related to several metrics. According to Frank, it used to take three to four weeks to gather and report this type of data; now it takes only a few hours.

"Icimo Analytics by Cherry Bekaert has helped us design processes to handle the data faster and more accurately," he said. "Management is provided with meaningful insight in a fraction of the time, allowing us to change course or intervene earlier, when necessary."

## Icimo Analytics by Cherry Bekaert: The Right Prism

"Icimo Analytics by Cherry Bekaert is always looking at things through the right prism," Frank said. "Their recommendations and implementation have been spot on and have provided us with insight into our data at a much faster and more efficient pace than we achieved in the past."

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"Icimo Analytics by Cherry Bekaert worked to understand our data and what it meant to the association and to our strategic plan."

- FRANK GARZA, Director of Strategy and Analytics

Icimo Analytics by Cherry Bekaert believes you should be enlightened by your data - *not limited by it*.

We can help you uncover the hidden story in your data so you can make critical business decisions based on knowledge, not anecdotes or assumptions. Let us guide you forward.

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