

CHEST: How A Single Tableau License Transformed An Association Into A Data-Driven Organization

Icimo Analytics by Cherry Bekaert was the onramp onto the highway of self-service analytics using the Tableau platform."

- Cole Grover, Data Governance Manager

The American College of Chest Physicians (CHEST) is a global leader in advancing best-patient outcomes through innovative chest medicine education, clinical research and team-based care. With more than 19,000 members representing 100+ countries around the world, CHEST connects healthcare professionals to the latest clinical research and evidence-based guidelines through the CHEST Journal, while serving an educational resource for clinicians through year-round meetings, books, mobile apps and live courses in pulmonary, critical care and sleep medicine.

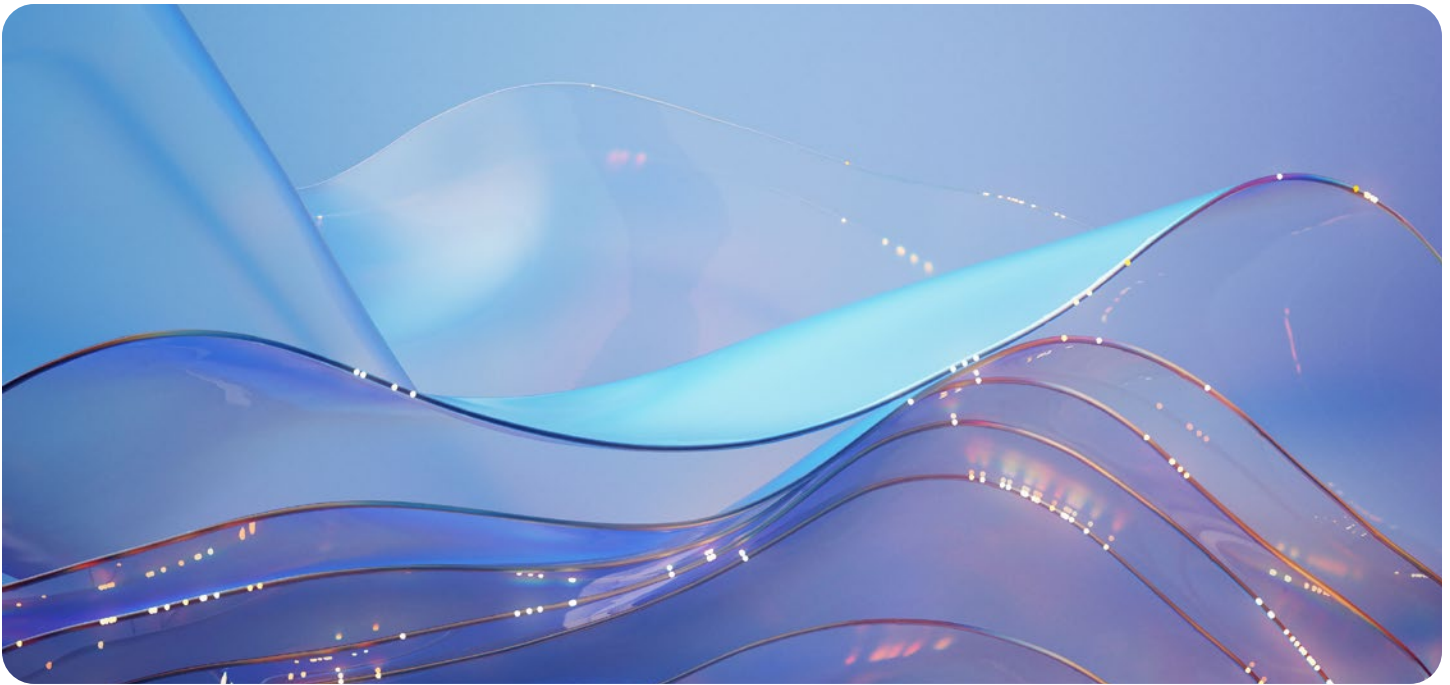
To enhance and strengthen the medical association's long-term position, the association created a strategic plan supporting a multiyear overarching vision. By leveraging their brand, technology, clinical expertise and data, they will champion the prevention, diagnosis and treatment of chest disease by providing innovative education and advancing best-patient outcomes. To maintain this vision, CHEST began to research data visualization tools that would enable them to further explore and build upon their mission. One Tableau desktop license was purchased to begin the process.

As Data Governance Manager, Cole Grover utilized the association's data to measure the progress of the association.

As the CHEST association's overarching vision continued to be rolled out, Grover and his team tracked and communicated registration trends of live events and courses to understand which customers and members were registering for their courses and to better plan for the future. Leveraging one Tableau desktop license, CHEST partnered with Icimo Analytics by Cherry Bekaert, a Tableau Premier Partner, to create an event dashboard to distribute through email and Tableau Reader.

With key insights into customer segments, registration behavior and historical trends shared throughout the organization, Grover and the executive team experienced first-hand the power of data and sheer potential of leveraging and sharing their data.

Realizing the importance of maintaining momentum in their analytics journey, CHEST purchased Tableau Server. Continuing to partner with Icimo Analytics by Cherry Bekaert, the team identified critical data sources and refined dashboards that evaluate progress on faculty selections, customer and product engagements, and comprehensive organizational goals. The organizational goals dashboard was



featured in the main gathering rooms of the association for employees to explore and interact with to determine progress with goals. Having a single point of contact not only virtually on Tableau Server, but physically on an interactive TV, allowed staff to easily share a common understanding of the business's main goals and progress towards reaching them. Each goal had a sub-dashboard that allowed for deeper analysis into the different business areas and their associated data sources.

As CHEST continued to rely on and share interactive dashboards association-wide, Grover leveraged several years of mentorship and skills training with the Icimo Analytics by Cherry Bekaert's data analyst team to spearhead teaching 34 business users how to use Tableau Desktop. At the charge of CHEST's new Chief Executive Officer, CHEST's analytics team used the template of the core organizational goals dashboard and created new dashboards to track the CEO's goals for staff over the fiscal year to monitor additional strategic product innovation and growth objectives.

To date, 34 CHEST full-time employees have been trained on Tableau Desktop with 23 active licenses and 140 Tableau users. All staff are familiar with how to leverage Tableau Server and CHEST continues to make daily progress on their mission to be a data-driven organization.

Icimo Analytics by Cherry Bekaert bootstrapped CHEST with a team of experts and a technological roadmap to implement, grow and sustain a culture of self-service analytics."

- Cole Grover, Data Governance Manager

In January 2020, Icimo Analytics was acquired by Cherry Bekaert.

About Cherry Bekaert

"Cherry Bekaert" is the brand name under which Cherry Bekaert LLP and Cherry Bekaert Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with applicable professional standards. Cherry Bekaert LLP is a licensed CPA firm that provides attest services, and Cherry Bekaert Advisory LLC and its subsidiary entities provide tax and advisory services. For more details, visit cbh.com/disclosure.

© 2022 Cherry Bekaert. All Rights Reserved. This material has been prepared for general informational purposes only and is not intended to be relied upon as tax, accounting, or other professional advice. Before taking any action, you should consult a professional advisor familiar with your particular facts and circumstances.

v. 11.29.2022 Brochure_icimo_Case-Studies_CHEST_995645160



cbh.com/digital



Cherry Bekaert

Your Guide Forward