Harnessing the Power of Data Insights for Hyundai Capital America

Hyundai Capital

INDUSTRY

Automotive

LOCATIONS

Irvine, California

URL

www.hyundaicapitalamerica.com

Company Overview

Hyundai Capital America (HCA) stands as a premier automotive finance subsidiary of the Hyundai Motor Group (HMG) - a leading auto OEM within the Global Fortune 500 rankings. Located in Irvine, CA, HCA is recognized as one of the top 10 auto finance companies in the U.S. and is pivotal in bolstering Hyundai, Genesis, and Kia vehicle sales with its comprehensive suite of financing options. Through its distinct service brands - Hyundai Motor Finance, Genesis Finance, and Kia Motors Finance, HCA offers specialized financial products crafted to fulfill the needs of Hyundai, Genesis, and Kia dealers across the U.S. This includes financing for dealer inventory and infrastructure. Moreover, in partnership with these dealerships, HCA extends indirect vehicle financing and leasing solutions to a robust customer base of over 1.7 million individuals.

Business Challenge:

HCA recognized early on that the key to success lay in harnessing the power of data insights, underscoring the need for an effective data visualization tool. As a result, they opted for Tableau as their Business Intelligence (BI) tool, operating it under a perpetual license model on their server. However, as demand surged, the server grappled with pronounced performance issues, primarily from the sheer number of users and scheduled data source refreshes. This deterioration in server performance led to considerable user dissatisfaction. Feeling the need for a thorough reevaluation of their BI strategy, HCA took a strategic step to pause their Tableau maintenance in 2019 and even potentially choosing a different data visualization platform.

At the assessment stage, HCA seemed hardly enthusiastic about Tableau. Over the years, various representatives from Tableau found it challenging to engage HCA effectively. The response was tepid, to say the least. HCA was not only hesitant but also declined involvement in several proposed activities. They didn't seem keen on committing to any form of collaboration or future planning. This lack of interest became increasingly evident, making it tough for Tableau to establish a solid footing with HCA during this period.

During HCA's evaluative journey, OSI Digital proudly stepped in as a trusted ally, bringing our expertise to fortify their BI assessments and refine their strategic direction. Our role was not merely that of consultants; we became partners, working shoulder to shoulder with HCA to fully comprehend the intricacies of their data ecosystem.

This initiative was steered by a set of overarching objectives:

> **Enlightening HCA Teams:** Our primary aim was to educate HCA's teams about the extensive scope and richness of their data resources. By deepening their understanding of the data landscape, we aimed to empower them to wield this asset more effectively.

> **Amplifying Data Utilization:** Through the data literacy program, we sought to elevate the utilization of HCA's data assets. By nurturing a data-driven mindset, we aimed to infuse a new level of insight into their decision-making processes.

> **Strengthening Data-Driven Strategies:** OSI Digital's commitment extended to bolstering HCA's approach to data-driven business management. We aimed to provide them with the tools and knowledge to strategically leverage data for driving business success.

> **Elevating Business Outcomes:** Our efforts were directed towards enhancing HCA's overall business performance by harnessing the true potential of data. The goal was to unleash insights that would fuel growth and innovation.

> **Empowering Tableau:** As a crucial facet of the initiative, we endeavored to equip HCA with the proficiency to leverage Tableau effectively. By transforming Tableau into a dynamic tool for addressing crucial business queries, we aimed to empower them with actionable insights.

During this pivotal phase, we carried out a rigorous examination of HCA's databases, Business Intelligence layer, and their overarching data analytics approach. This deep dive led us to a revealing gap analysis. It highlighted a tangible disconnect between what the business aspired for, and the actual utility derived from their current tools. We identified significant knowledge gaps concerning tool optimization and a pronounced need for a more structured, curated data layer. Additionally, it was evident that their existing setup wasn't aligning well with their aspirations for enhanced analytics to meet pressing business demands.

Behind the scenes, we worked closely with the HCA team and kept them from choosing a different platform by explaining/conducting numerous sessions which were mostly non billable. We keenly identified the gaps in their utilization and initiated a series of strategic endeavors to bridge these gaps. A pivotal milestone was the launch of an illuminating data literacy training program.

The Solution:

We meticulously curated our training program's content to cater to varied audiences with distinct needs:

> **For the Executive Team:** Our training aimed to shed light on the transformative power of data. By grasping how data could address both opportunities and challenges, the leadership could drive the company with enhanced clarity and vision.

> **For Business Leaders:** Beyond the insights provided to the executive team, departmental heads were immersed in a deeper exploration of data tailored to their specific business segments. They were introduced to their unit-specific data sources, key performance indicators, metrics, and governance protocols to better manage and optimize their departmental operations.

> **For Data Consumers:** This wide-ranging group encompasses users across the organization who interact with prepared dashboards and reports. Our training equipped them with the skills and knowledge to interpret and utilize these resources effectively.

> **For Data Engineers/Visualizers:** Positioned within the Central Data Office (CDO), these are the data mavens responsible for crafting data resources, be it data warehouses, marts, reports, or dashboards. Their training was intensive, focusing on the technical nuances and intricacies that are vital for their roles.

> **For Future Data Scientists:** Envisioning HCA's ambitious plans to delve into advanced data analytics, we also tailored a segment for potential data scientists. This covered tools, techniques, and methodologies they'd employ, including machine learning models and the effective utilization of data warehouses.

Our training curriculum was thoughtfully segmented into several modules, ensuring a step-by-step progression that would cater to the diverse needs of the HCA team. By dividing the curriculum into distinct modules, we aimed to provide a comprehensive and in-depth exploration of each topic, allowing for a more immersive and enriching learning experience.

> **Module One:** Often referred to as our foundational pillar, this module laid the groundwork. Its primary focus was to introduce participants to the pivotal concepts of business data analytics. We believed that a robust understanding of data governance and the nuances of data quality were vital. So, we dedicated ample time to reinforce these ideas, ensuring that participants could appreciate their broader significance in the data ecosystem.
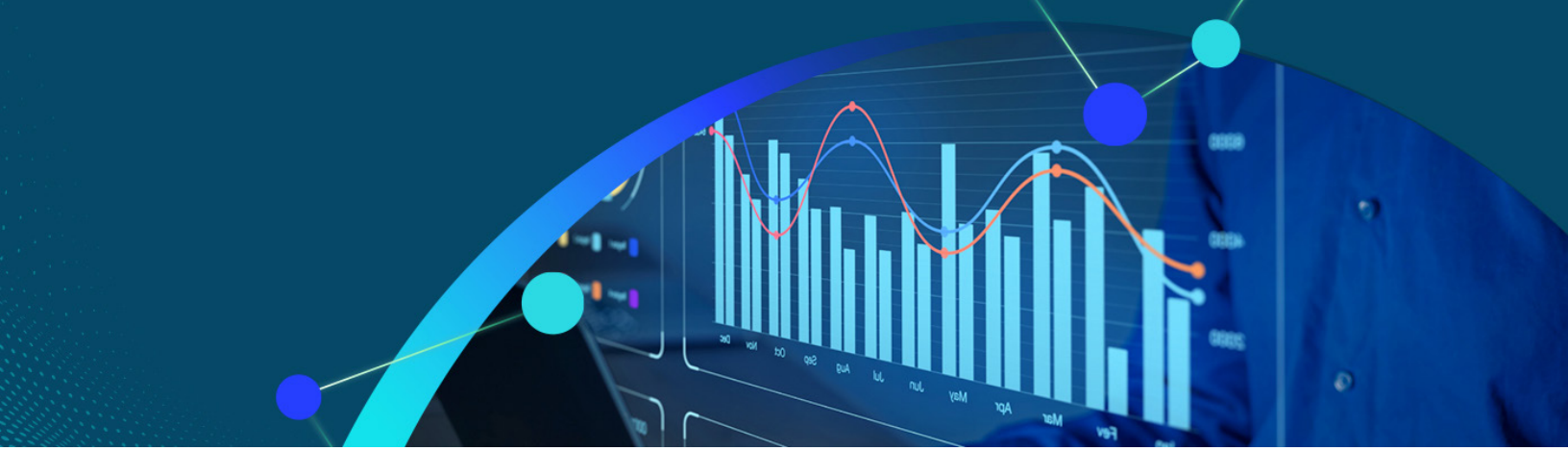
> **Module Two:** As we transitioned from foundational concepts, this module took a decidedly technical turn. Recognizing the importance of hands-on skills in the modern business environment, we dedicated this section to tool mastery. Participants were introduced to the intricacies of SQL and got a deep dive into the functionalities of Amazon Redshift. But the crown jewel was our extensive coverage of Tableau. Given its multifaceted nature, we segmented our Tableau training to cater to various proficiency levels, ensuring that every participant, whether a viewer, explorer, or creator, had tailored content. Participants were not just passive learners; they actively developed multiple dashboards using HCA's authentic datasets. These sessions were intensely hands-on, with trainers guiding participants through the dashboard development process in real-time. The experiential learning didn't end there. Post each session, participants were entrusted with assignments, challenging them to apply their freshly acquired knowledge. This iterative process of learning and application ensured a deep-rooted understanding of the tools and techniques, setting the stage for more advanced modules ahead.

> **Module Three:** As we delved deeper, this module was designed for those at the cutting edge of data technology. It was all about advanced technical skills essential for the conceptualization, development, and refinement of the Analytical Data Warehouse (ADW). Recognizing the unique needs of data engineers and visualizers within the CDO, the content was tailored, equipping them with tools and insights critical to their roles.

> **Module Four:** This was our magnum opus, the culmination of our training journey. Dedicated exclusively to aspiring data scientists, this module unveiled the most advanced methodologies. The objective was clear - to arm them with the technical prowess they'd need to drive innovation, research, and advanced analytical solutions in their future endeavors.

We also provided participants with in-depth training materials to reinforce what they learned. To further enrich their learning experience, we produced corporate training videos that covered these advanced topics in detail. These videos allowed participants to revisit complex concepts at their own pace. And to ensure clarity and address any lingering questions, we rounded off our sessions with dedicated Q&A segments, ensuring every participant felt confident and well-equipped in their data science journey.

Throughout the course's progression, our relationship with the Tableau sales representatives intensified. Recognizing the importance of keeping them in the loop, we regularly updated them on HCA's status, the challenges faced, and the milestones achieved. This continuous communication fostered a sense of shared responsibility and mission. Together, we crafted a sales strategy that would resonate with HCA's aspirations and challenges. During this course, we had multiple discussions around Tableau Cloud. Given the challenges that HCA had been facing with their on-prem Tableau Server installation, we believed that Tableau Cloud could offer them scalability, flexibility, and enhanced performance. To give them a clearer picture, we embarked on a detailed exploration of their existing setup. HCA's current Tableau ecosystem was vast, encompassing 22 separate sites and a whopping 500+ dashboards. These dashboards sourced data from a diverse range of cloud-based databases, on-premises databases, and even flat files. Acknowledging this intricate web, our approach was systematic and thorough. We scheduled a series of in-depth meetings and interactive sessions. The aim was to address every query HCA had, ensuring they had a comprehensive understanding of potential architectures and the best practices associated with them. But we didn't stop at just guidance.

Driven by a commitment to excellence, we dedicated ourselves to developing robust and future-proof architecture tailored for HCA's migration to Tableau Cloud. We supplemented this with an exhaustive cost analysis, meticulously outlining potential expenses, savings, and the value proposition. Alongside, our set of carefully curated recommendations provided a roadmap for HCA's journey ahead.

The Results:

The result of these concerted efforts was a transformational shift in HCA's perspective. With clearer insights, detailed plans, and our unwavering support, HCA began viewing the move to Tableau Cloud not just as a possibility but as a strategic step forward in their data journey.
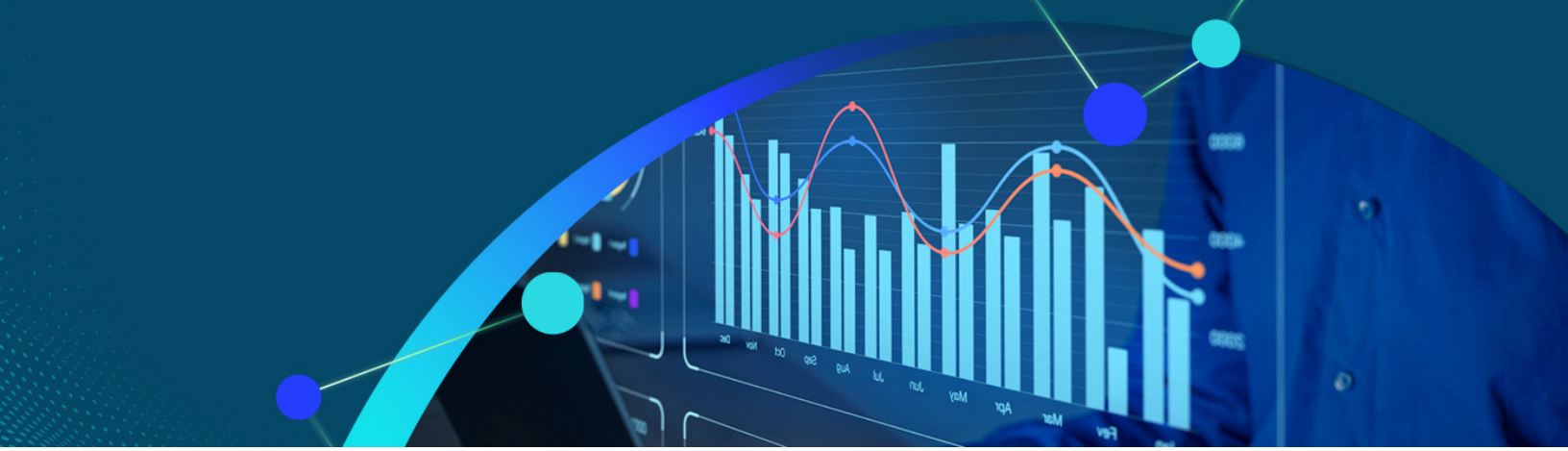
At OSI, our commitment to excellence and deep-rooted expertise became the cornerstone that steered Tableau towards a monumental agreement with HCA. This wasn't a mere transaction; it was a testament to trust and collaboration. The deal, grand in its scope, encompassed several sites with an acquisition of over 1,300 licenses. However, the numeric magnitude is just one side of the coin. More significant was the trust and responsibility HCA placed in our hands. They chose OSI to lead the crucial transition of their Tableau server to the advanced Tableau Cloud. This was not by chance but a result of the confidence they had in our capabilities. We didn't just play a role; we were the bridge, the catalyst that transformed discussions into decisive actions, ensuring a prosperous alliance for both Tableau and HCA. Our involvement was both strategic and hands-on, showcasing the depth of value we bring to such partnerships. Here is a high-level plan we scoped with HCA and signed an SOW to migrate their Tableau server to Tableau cloud:

Analysis of the Current Environment: Conduct a thorough analysis of the current Tableau Server environment to identify any required changes or modifications to the migration plan and come up with detailed migration plan/blueprint that outlines the tasks and steps involved for a successful migration.

Tableau Online Setup and Configuration: Depending on the analysis made, OSI will come with proper project/folder structures that needs to be created/maintained on the Tableau Cloud. This involves the creation of development and production project spaces.

Tableau Bridge Setup: Install and configure the Tableau Bridge connection on dedicated VM's. Tableau Bridge connection is required to push/publish any on-premises data to cloud. We may need to configure multiple bridges to parallelize the refresh process for datasets.

Tableau Server Backup: OSI will take the backup of the dashboards and data sources that are needed to migrate to Tableau Cloud.

Content Migration: OSI will either use Tableau Rest Migrate tool or Tableau Content Migration Tool to extract and migrate the content from Tableau Server to Cloud. User groups, schedules tasks are configured manually.

Security, Authentication and License Management: Configure the authentication method for all the users to sign into Tableau Cloud and assign them appropriate license roles, security groups for content creation and access.

Configuration: Configuration of Extracts and Subscriptions are different in Tableau Cloud, OSI will configure appropriate schedules and subscriptions on Tableau Cloud to mimic the current Tableau server process. After the configuration, OSI will conduct a series of testing involving data sources refresh and subscriptions.

Testing: OSI will conduct a series of testing. This testing involves validation of workbooks and dashboards to ensure their functionality is the same in Tableau Cloud. Reconfigure the workbooks as necessary.

User Training: Provide end-user training on how to access and use Tableau Cloud.

Post-Migration Support: Provide post-migration support to ensure that any issues that arise following the migration are addressed promptly. Provide guidance on best practices for managing and maintaining Tableau Cloud.

In July 2023, HCA entered into an agreement with Tableau and bought Tableau cloud licenses along with multiple sites. Subsequently, in July 2023, they inked a migration project deal with OSI.

Next Phase:

As part of this endeavor, we'll be collaborating closely with various departments at HCA, including Accounting, CDO, Commercial, Finance, Marketing, and Sales. Following the migration, our commitment doesn't end; we'll engage in extensive training and education for these teams. Our primary goal will be to amplify cloud adoption among them. Furthermore, we're keen to discuss and initiate further strategies to assist them with their Tableau development initiatives.

OSI Digital

About OSI Digital

OSI Digital, Inc., provides purpose-built business and technology solutions that optimize performance to enable data-driven outcomes for our customers. OSI accelerates digital transformation by offering integrated solutions that capture, secure, integrate, analyze and optimize data. Our services include the design, development and implementation of new solutions as well as the ongoing management, enhancement and support of our customers' existing business systems.

OSI Digital was founded in 1993, in California and has since expanded to a global team of employees worldwide. We have offices in the US, Canada, India, Philippines, Dubai and Australia. Our main offshore delivery center of excellence is located at our state-of-the-art campus in Hyderabad, India, with additional locations in Chennai, Delhi and Bangalore. For over 30 years, we have supported a diverse portfolio of customers across various industries, including: Software & Business Services, Financial Services, Life Sciences & Healthcare, Manufacturing, Energy, Retail, Agriculture and the Public Sector.

Our client base ranges from start-ups to Fortune 500 corporations, including: Beachbody, Hyundai, Toyota, Gilead, Allergan, Yamaha, Gap Skechers and more. OSI Digital has developed strong partner alliances with the world's leading technology providers such as Tableau, Salesforce, Oracle, Microsoft, Amazon Web Services, Boomi and Snowflake.

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