

# CUNA MUTUAL GROUP BUILDS A SCALABLE DATA ARCHITECTURE WITH SNOWFLAKE AND ALTERYX

## FINANCIAL SERVICES



**COMPANY** CUNA Mutual Group  
**LOCATION** Madison, Wisconsin

## SNOWFLAKE WORKLOADS USED



CUNA Mutual Group believes in making a brighter financial future accessible to everyone. Established in 1935, CUNA Mutual Group provides insurance and investment products to 30 million consumers and 95% of credit unions in the United States. To support data-driven decision-making across sales, marketing, and operations, CUNA Mutual Group ingests and analyzes large amounts of financial industry data.

## STORY HIGHLIGHTS:

### Snowflake Partner Connect

Connecting Alteryx to Snowflake provides a scalable data pipeline for ingesting and aggregating CUNA Mutual Group's data.

### Extensive network of connectors, drivers, programming languages, and utilities

Snowflake's interoperability with a variety of popular BI tools aligns with CUNA Mutual Group's self-service approach to analytics.

### Single source of truth for data science

Organizing CUNA Mutual Group's data into multiple layers makes it easier for data scientists to access data, build sophisticated models, and share results.

“Snowflake is a big enabler of how we develop and commercialize data science models.”

—STEVEN KONKOL,  
Data, Analytics and Reporting Leader, CUNA Mutual Group

## CHALLENGE:

### Eliminating data silos and migrating faster to the cloud

CUNA Mutual Group's data was spread across multiple on-premises databases, which inhibited the data team's ability to keep pace with demand for self-service analytics. Data science was almost impossible without a single source of truth.

CUNA Mutual Group began migrating its data to the cloud as part of a companywide modernization initiative, but doing so was time-consuming, costly, and required a significant amount of technical expertise. Transferring on-premises data silos to the cloud did not solve the company's underlying data problems. “We needed to allow departments to get their data into the cloud and help them manage, govern, share, and leverage it,” CUNA Mutual Group's Data, Analytics and Reporting Leader Steven Konkol said.

Seeking to expedite its cloud migration project, simplify reporting for approximately 500 users, and enable predictive and prescriptive analytics, CUNA Mutual Group began evaluating enhancements to its data infrastructure.

## SOLUTION:

### A platform for scalable data analytics and data science

Realizing the need for a modern data environment, CUNA Mutual Group turned to Snowflake.

Connecting to Alteryx a unified data science, analytics, and automation platform via Snowflake Partner Connect accelerated the ingestion and aggregation of data from CUNA Mutual Group's source systems. Snowflake's interoperability with a variety of popular BI tools aligned with the company's self-service approach to reporting.

500

Approximate number of self-service reporting and BI users

Rearchitecting CUNA Mutual Group's data into a three-tiered structure (gold, silver, bronze) provided the right mix of flexibility and control to support the company's data analytics and data science use cases. Bronze-layer data empowered data scientists to build sophisticated models, generate new insights, and pipe results back into Snowflake. According to Konkol, "Snowflake is a big enabler of how we develop and commercialize data science models."

Snowflake's fully managed infrastructure, elastic scalability, and governance features freed up additional resources for maximizing data's impact. "Snowflake is immensely helpful for providing the quality and timeliness of data that the business needs," Konkol said.

## RESULTS:

### Supporting B2B sales teams with actionable insights

Building a scalable data pipeline with Snowflake and Alteryx fosters enhanced levels of collaboration with revenue-generating teams. According to Konkol, "Our Ops model involves understanding experience units' top priorities, identifying how data and analytics can help, and partnering to provide the right tools and models." Delivering timely and reliable insights to CUNA Mutual Group's sales managers bolsters ongoing efforts to acquire, retain, cross-sell, and upsell credit union clients.

**“We’re able to provide better insights faster, and we’re helping the overall efficiency and effectiveness of our business—plain and simple.”**

—STEVEN KONKOL,  
Data, Analytics and Reporting Leader, CUNA Mutual Group

### Streamlining wealth management outreach and engagement

CUNA Mutual Group's "blueprint for success" uses a set of data science models, powered by data stored in Snowflake, to help wealth management advisors prioritize their outreach activities. Propensity scoring models identify credit union members who are most likely to benefit from CUNA Mutual Group's products. "We're able to provide better insights faster, and we're helping the overall efficiency and effectiveness of our business—plain and simple," Konkol said.

Data science is also transforming how CUNA Mutual Group builds new relationships with thousands of other wealth management advisors. According to Konkol, "Our models are allowing us to predict the next adviser that's going to sell one of our annuity products."

### Leveraging data across the organization

Data scientists in CUNA Mutual Group's consumer division leverage segmentation data sets to help marketers develop effective campaigns. Underwriters, actuaries, and fraud teams use data from Snowflake to perform ad hoc analyses.

Acquisition teams use Snowflake to evaluate opportunities and make data-driven decisions. Snowflake also plays an important role for onboarding newly acquired companies. "From an IT perspective, data integration has become an important aspect for us," Konkol said.

**“As clients evolve in this industry, the capabilities that Snowflake and Alteryx provide will enable us to do great things and serve them better.”**

—STEVEN KONKOL,  
Data, Analytics and Reporting Leader, CUNA Mutual Group

## FUTURE:

### Expanding data science and analytics while minimizing complexity

Predictive and prescriptive modeling is a top priority for CUNA Mutual Group. According to Konkol, "Surfacing the next best actions to sell or retain will help our sales teams become as effective as possible."

"The goal is to have one place to manage and share data for better consistency and quality of output," Konkol said. "Centralizing CUNA Mutual Group's data sources directly to Snowflake with Alteryx will deliver increased performance with less complexity."

## ABOUT SNOWFLAKE

Snowflake delivers the Data Cloud—a global network where thousands of organizations mobilize data with near-unlimited scale, concurrency, and performance. Inside the Data Cloud, organizations unite their siloed data, easily discover and securely share governed data, and execute diverse analytic workloads. Wherever data or users live, Snowflake delivers a single and seamless experience across multiple public clouds. Join Snowflake customers, partners, and data providers already taking their businesses to new frontiers in the Data Cloud. [snowflake.com](https://www.snowflake.com)