



inspire

DATE 2025 LAS VEGAS

THE ANALYTICS EVENT

Finance of the Future

Shain Grimm

Vice President; Mgr - Finance Business Support
Westlake Village, California

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A Little About Me

Been with the company for 20 years

My job is primarily focused on automation like Alteryx and SQL development

I've been using Alteryx for about 6 years.

I wrote an internal book called SQL Best Practices

First time at Inspire.

Been married for 12 years and a father of 2

Born and raised in Southern California / Los Angeles / Ventura area

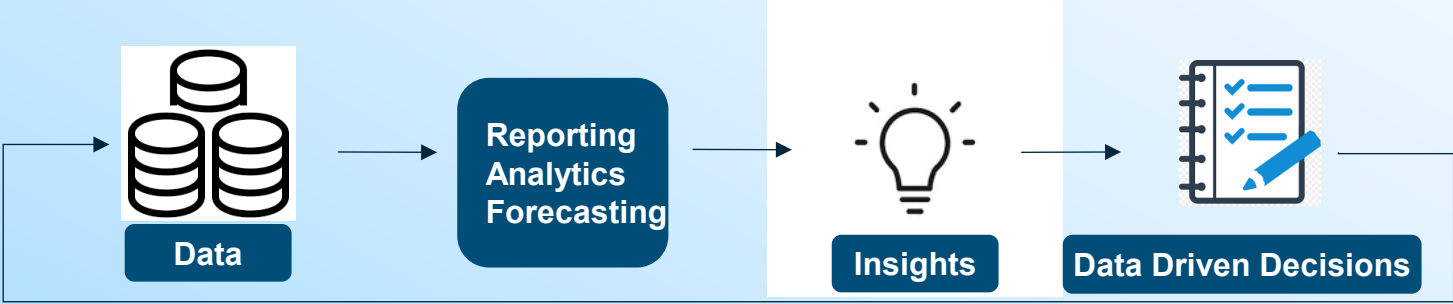
Finance of the Future



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Our team's vision

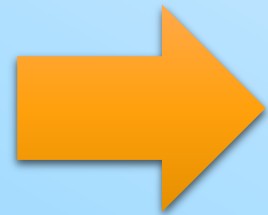
- 1. Create a One stop shop platform for reporting, analytics and forecasting
- 2. Empower users to make actionable decisions driven by insights gathered from various data sources across the business



Objective	Approach
Improve efficiency	One stop shop, Robust tool
Improve engagement	User friendly and customizable
Access to data	Self Serve Solution
Adherence to governance	Data sources accuracy and well controlled
Reduce time to insight	Value add information, completeness

Our innovations showcase in real practice

Alteryx inspired Ecosystem



Automatic update Excel daily or monthly



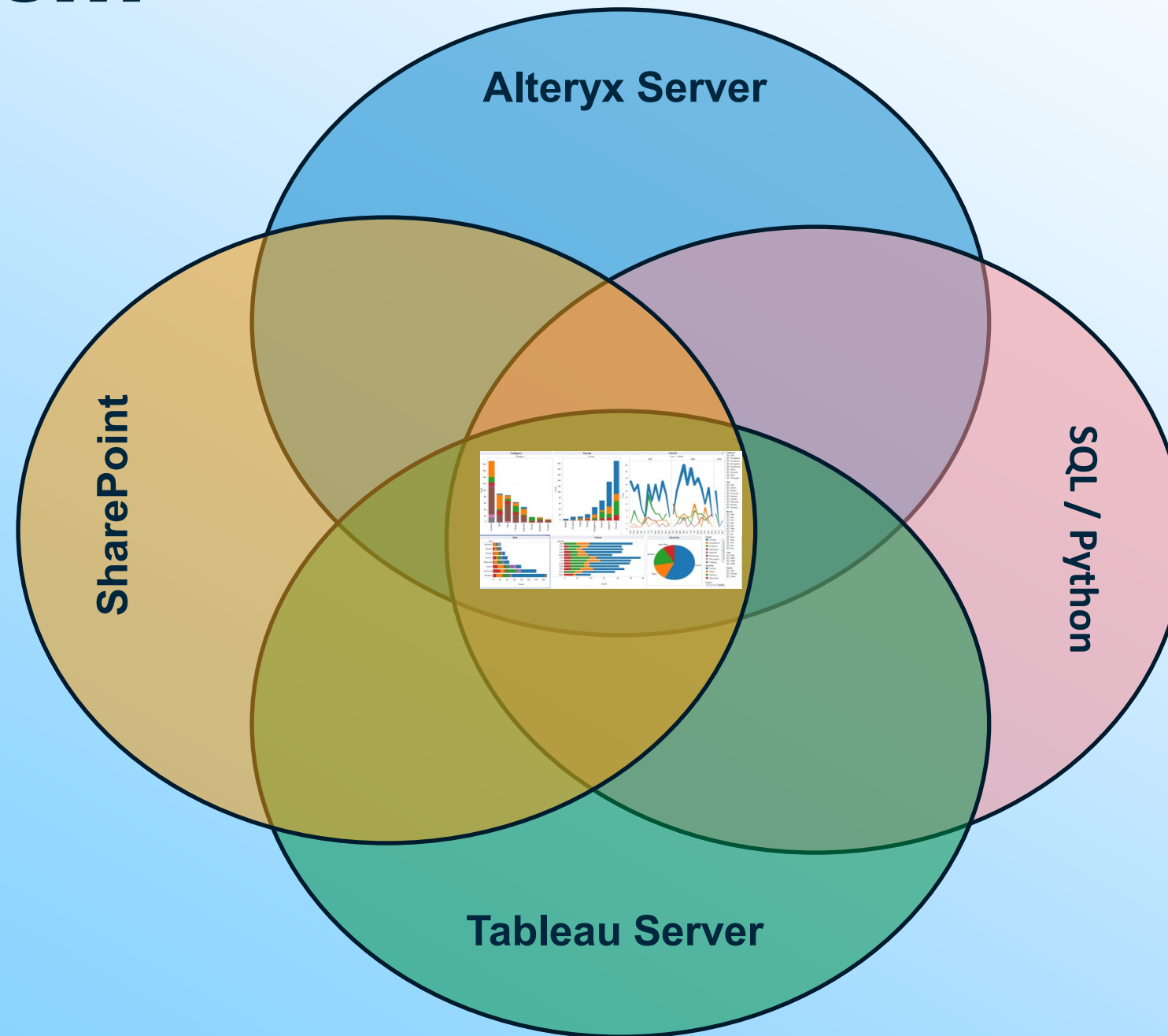
Automatic update Tableau reports

Cuts down on Ad-Hoc Reporting requests and turns to user self-serve download and analytics

*Daily/Monthly Transactions,
Forecasts, and
General Ledger data extracted
from various databases*

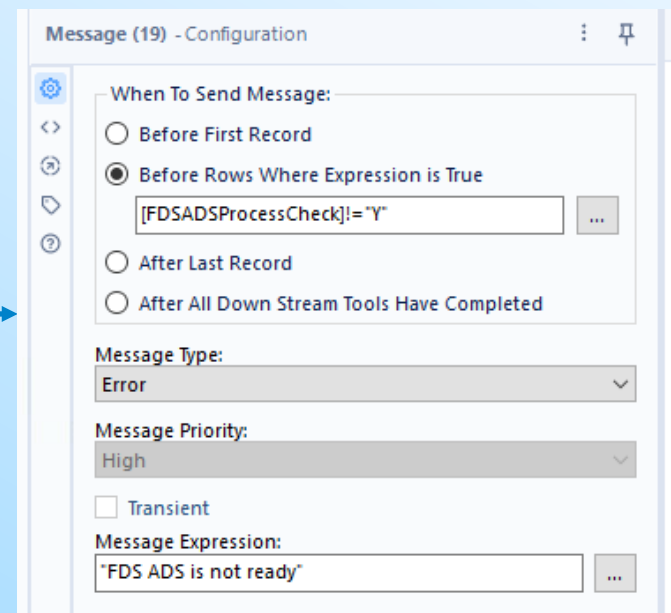
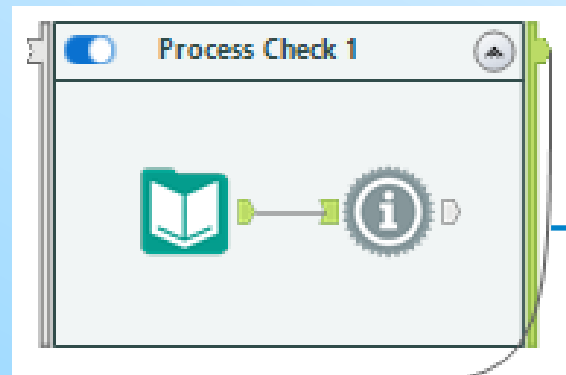
Working together is Success

Ecosystem

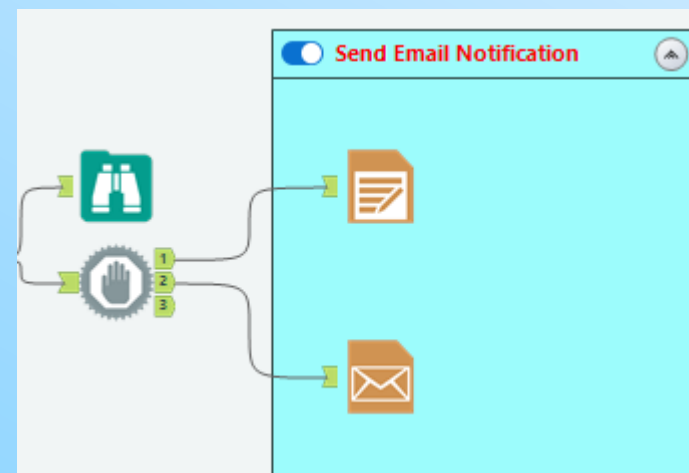


Alteryx Journey to Server development, a flow into controls

- **Effectively manage Alteryx jobs on Gallery:** Schedule the workflows after system cut-off.
- **Workflow results QC:** Monitor workflow results in Alteryx Gallery.
- **Email sending function:** Use SMTP for Server email notifications.
- **Backup files for troubleshooting:** Save back-up Excel files for QC and debugging.

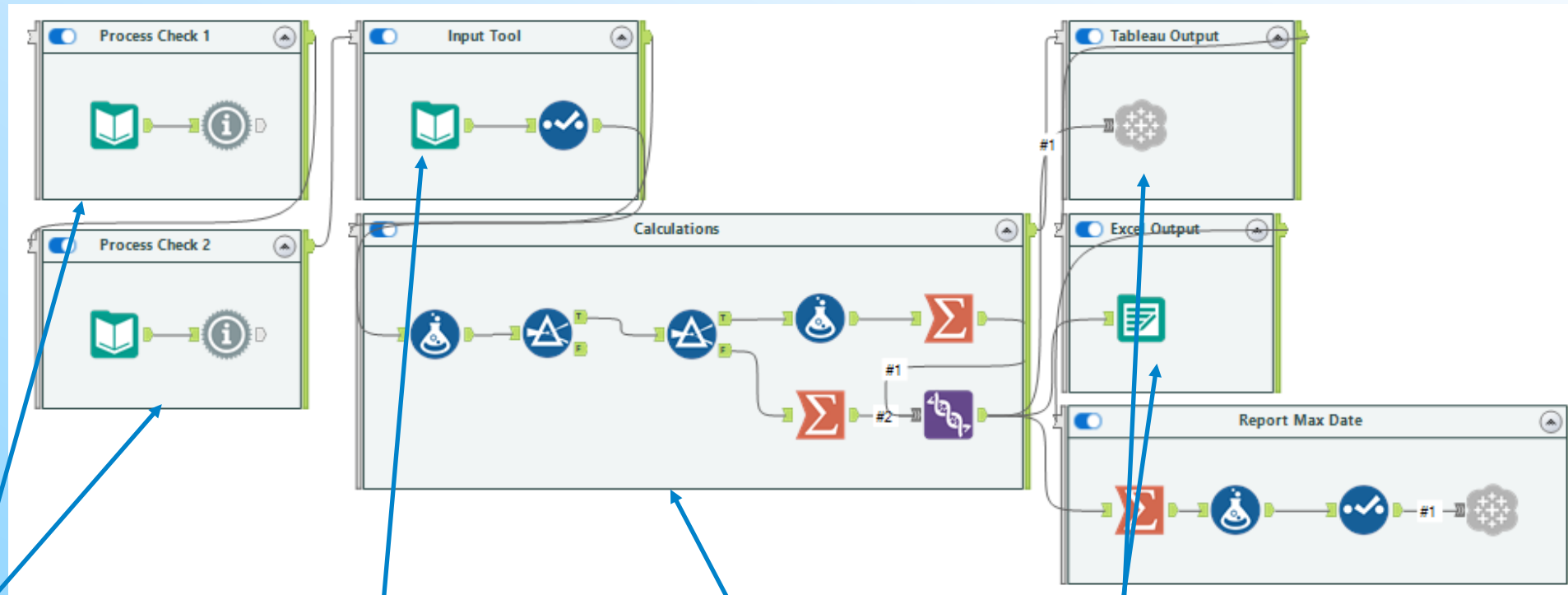


Message tool kicks off error if the supporting table update has not completed. The email sends an alert and explain the source of the issue.



SMTP is also used to send email with consolidated version of data after workflow completion.

Alteryx workflows have controls and best practices



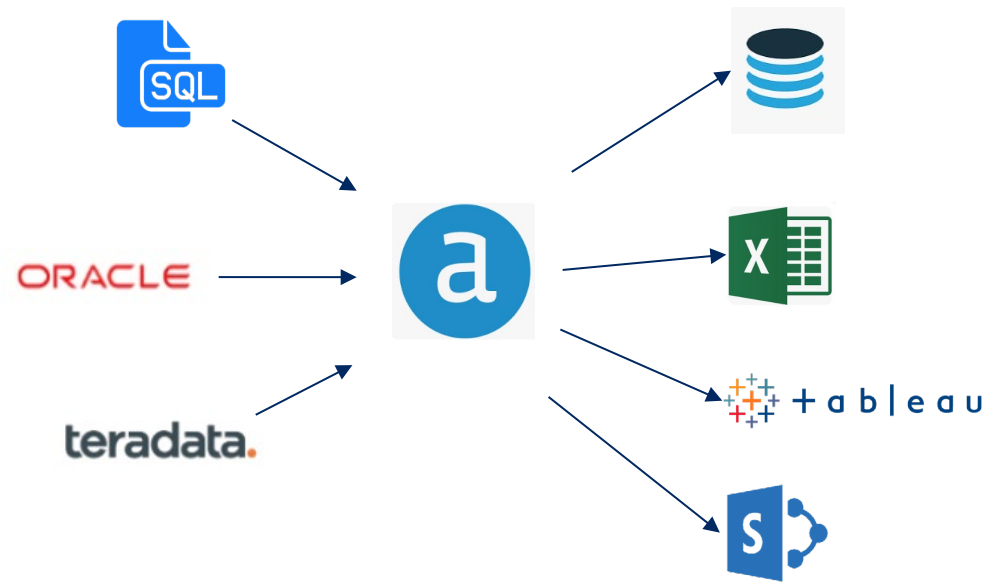
Step by step control containers ensure source data is ready to be used before rest of workflow can be run

Efficient SQL code ensures that workflow runs in a timely fashion.

Multiple data transformations are designed and captured for automatic processing (less risk than manual).

Tableau Output for Tableau Server along with Excel version of data output for analyst research on report data questions.

Input Data and Data streaming



SQL Development and Best Practices

Alteryx is being used as a central engine to extract various data sources from databases such as MS SQL, Oracle and Teradata, then generate outputs into database tables, Tableau, Excel and SharePoint.

- I. Develop SQL scripts to extract data from database. Use most efficient driver for input / output.
- II. Continually review code on a periodic basis for best practice implementation and current coding standards.
- III. Let servers do as much of the work as possible so when Alteryx receives data, further adjustments are minimal.
- IV. Sharing SQL best practices through a monthly class that incorporates interaction with tools like Alteryx.

Tableau Journey, from Workbooks to Server Development

- We use Tableau Server as the main presentation and distribution of our financial reports. Alteryx's main job responsibility is to extract, aggregate data, and then output to a friendly loading format.
- We connect Tableau to the published data sources generated by Alteryx so reports on the Tableau server can be updated timely based on the frequency when published data sources are refreshed.
- Reports are updated behind the scenes, so users see seamless updates on a daily basis.



Update Frequency :



Daily/Monthly/Forecast

250+

Users

150+

Reports



Reporting:



Actuals / Forecast / Balance Sheet

Questions/Feedbacks



What has Alteryx/Tableau Journey facilitated :

- ❑ Alteryx/Tableau automatically update daily/monthly Tableau reports
- ❑ Reduced manual efforts by ~98%, with dashboard production ~90% automated
- ❑ Tableau reports provides Key Metrics Details: Balance Sheet, Income Statement, Trend Analysis
- ❑ Provides convenience for both analysts and end users by eliminating dependencies
- ❑ Quick turnaround for most business partners in Finance
- ❑ Adds additional controls and oversight
- ❑ Customizable / Dynamic reporting capability

SharePoint, going from a Document Warehouse to Web Page development.

Welcome to the CFO Secured Lending Reporting Home Page!

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This site houses all Secured Lending reports in Excel and Tableau, allows end users to browse, subscribe and download the reports.

For assistance or any questions & queries please contact dg.redfinsupport@bofa.com

Tableau dashboards are intended for internal use only; Please work with Secured Lending Finance Team for any requests going to external audiences.

First Mortgage

Home Equity

Vehicle Lending

Structured Lending

Click here for Metadata

METADATA

Welcome to First Mortgage Reporting Site !

Go Back

Portfolio

New Origination

Profitability

Forecast

Ad-Hoc Report

Profitability

ID	Report Name	Business Unit	Report Description	File Type
1	Affordable Loan Program P&L by Market	Consumer	Profitability Report for all affordable loan programs in US market	Tableau
2	Consumer CRA Affordable Loan P&L Summary	Consumer	Profitability Report for all affordable loan programs in first mortgage	Tableau
3	Consumer ME/YTD Period-End P&L	Consumer	Month-end & YTD Profitability Report for Consumer Mortgage	Tableau
4	Consumer NACA Program P&L Summary	Consumer	A dedicated profitability report for NACA program only	Tableau
5	Consumer QTD Period-End P&L	Consumer	QTD Profitability Report for Consumer Mortgage	Tableau

While Tableau has options for hyperlink use, we initially used it to build a Table of Reports; we switched to SharePoint as maintenance of the hyperlinks is more manageable.

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Thank you for the opportunity to share our journey with you.

QUESTIONS



alteryx

End of Slides