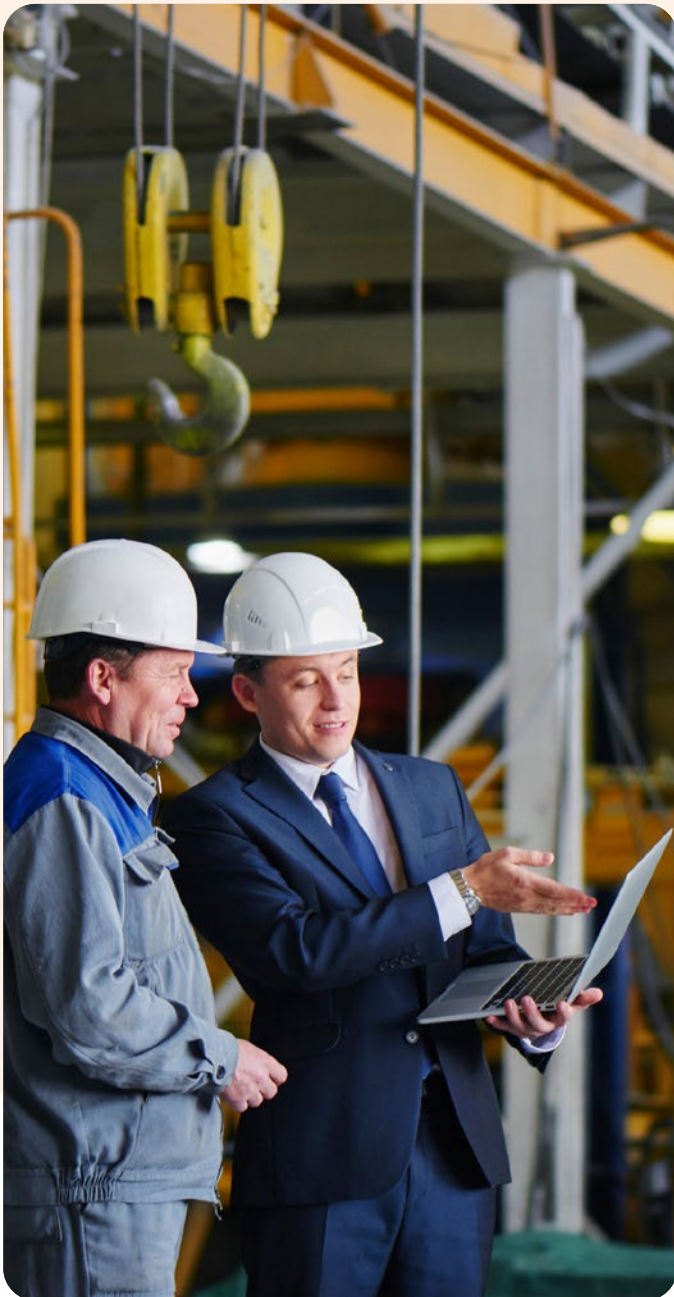# LiUNA's Journey to Data Insight

The Laborers' International Union of North America (LiUNA) is an American and Canadian labor union comprised of over 500,000 members and serves as an umbrella organization for many smaller organizations.

Members are united through collective bargaining agreements to improve the lives of workers by ensuring strong compensation, good benefits and career-advancement opportunities. While the union's workforce specializes in the construction and energy industries, it also represents public employees from health care and sanitation to road maintenance and emergency response.

LiUNA's Data Vision

As a membership organization, LiUNA's main objective is to enhance the lives of its members. A critical area of strategic focus for LiUNA's mission relies heavily on analyzing their membership data. This analysis helps to better understand their membership population, thus finding new ways to connect and advocate for their members. The organization had conducted an extensive search for the proper data visualization

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reporting software to serve their needs and identified Tableau Software as their platform of choice. Prior to building the reports, they needed to begin with an organized data retrieval system. With several legacy systems in place and data in disparate sources, LiUNA aimed to integrate their data into their new central repository—an SQL Server-based data warehouse—and publish their reports to their Tableau Server.

Historically, LiUNA's membership data had been entered and maintained in a file-based application system. With a new initiative underway to build a new membership system based on a SQL Server backend, LiUNA needed to migrate its data by merging data from the file-based application system and the new membership system. However, migrating and merging the data from two different systems presented complications. Matthew Richard, Chief Information Officer of LiUNA, instilled the help of Cherry Bekaert Digital Advisory. Cherry Bekaert collaborated with LiUNA's solution architect consultant to validate the new data warehouse structure, building out a new backend data source to mirror the legacy structure on the frontend. Cherry Bekaert built Tableau QC reports to catch exceptions in data across the old and new systems.

This was a critical point for the team as the visualizations prompted LiUNA to thoroughly compare data from the old to the new system, determining what changes needed to be made in the background. This action defined new store procedures for LiUNA to process the data appropriately.

Pivoting Data and Project Expectations

While the initial project was to assist LiUNA in their data migration and report building, Cherry Bekaert and LiUNA were able to easily pivot expectations and deliverables. This redirected LiUNA's focus to preparing data for migration and setting LiUNA on track for success.

"That is the wonderful thing about working with Cherry Bekaert. It wasn't like they said, 'No, this isn't the scope we agreed to.' They basically said, here's the hours we agreed to, and we can use them toward this initiative instead. That created a lot of trust amongst the team," said Richard.

Cherry Bekaert

Advancing the Vision With Tableau

Once the data migration problem was solved, LiUNA teamed up again with Cherry Bekaert to renew the initial project, the data conversion to a Snowflake warehouse leveraging Tableau for robust visualizations and deeper analysis. LiUNA's reporting priority was to establish an executive-level report, identifying members by locals, regions and executives. This report required robust calculations to match logic of existing reporting and to expand into new reporting capabilities. Focusing on members by location, LiUNA advocates for members and assist them with employment, safe working conditions with proper compensation, benefits and local engagement with elections.

Likewise, LiUNA can then engage with members to advocate for causes important to the labor movement. Cherry Bekaert created Tableau dashboards, enabling LiUNA to pinpoint congressional districts and city councils. If there's an initiative going on, whether it's redoing pipes in Flint, Michigan, or building a new tunnel to connect New Jersey to New York, LiUNA can easily advocate for members who live in those areas. The precision in the data allows LiUNA to specifically target members with information around key issues so they can advocate with the appropriate government officials to drive important change.

Alteryx for Data Ingestion and Manipulation

By moving away from the legacy systems and improving data accuracy in the new systems, LiUNA has started working with the Cherry Bekaert team using Alteryx Software to connect to external data packages and further visualize data through Tableau-designed dashboards. "Now that we're leveraging external data packages, we're using Alteryx to be that kind of ingestion engine, and then data manipulation engine to enhance our membership data sets," says Richard.

> Alteryx enables us to cross reference data or match data with ease and not deal with a bunch of complex SQL scripts."
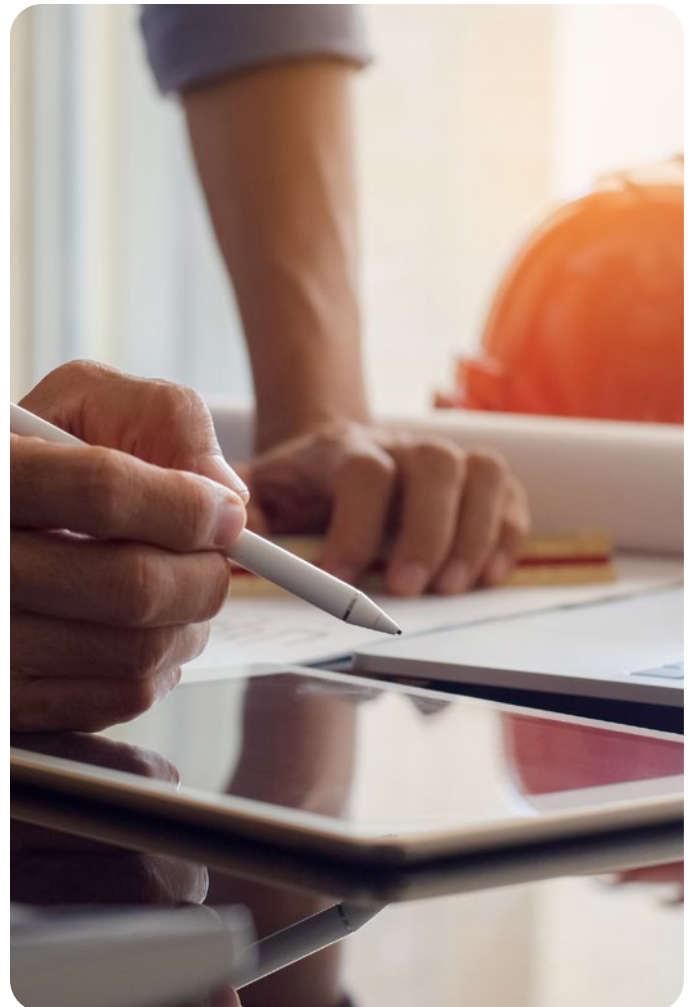
Tying external data packages together with membership data allows LiUNA to bring precision into their analysis, allowing deeper insights into critical information.

Upskill Tableau and Alteryx Skillsets

"The insights just expand from there," Richard says.

> The Cherry Bekaert team continues to empower the LiUNA team, providing them with the knowledge and skill set needed to understand software capabilities and make smarter data connections."

"Because of the partnership with Cherry Bekaert Digital Advisory and the skill set and training they have provided my team, we are now able to use our relationship with Cherry Bekaert as an accelerator. If our resources are limited or we are dealing with a complex problem," said Richard, "we can rely on the Cherry Bekaert team to step in."

A Meaningful, Data-Driven Future

Investing in Tableau and Alteryx Software, integrating the platforms throughout their systems and understanding the software capabilities continues to have a significant impact on LiUNA's ability to drive meaningful change across the organization. Executive members can access reports in real-time, saving countless daily staff hours across the organization of manually searching for information and manipulating paper and excel reports.

Overall, "the ability to answer questions that we weren't able to answer before within two clicks of a button and provide insight or, even more impactful, enable our executives and their staff to access the insights directly in real time has made the organization better," said Richard. "The Cherry Bekaert team has taken the time to understand the problem we're trying to solve as it impacts my unit and the labor movement and that goes a long way with helping us build visualizations and reports to tell the stories we needed to tell."

"We can do these things because we have a partner who understands the mission of my organization and wants to do more than just build a report based on my requirements. I think we have a lot more exciting projects to come when I think about the big picture, and I think Cherry Bekaert will be a part of that picture for a long time."

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About Cherry Bekaert

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