



Tableau for Financial Services

Turn disconnected financial data into insights that strengthen performance, compliance, and customer trust



In financial services, every decision counts. Yet fragmented systems and manual reporting often limit visibility into risk, performance, and profitability. Argano helps financial institutions connect and modernize their data foundation with Tableau's intelligent analytics platform-spanning Tableau Server, Tableau Cloud, and Tableau Next.

Through Argano's deep expertise in integration, data strategy, and analytics modernization, organizations can move from reactive reporting to proactive intelligence. Together, Argano and Tableau deliver governed, real-time insights that enhance compliance, strengthen risk management, and unlock opportunities for growth-empowering firms to make faster, more confident decisions in a dynamic financial landscape.

Key Financial Services Use Cases

Risk & Compliance

Monitor key risk indicators and compliance thresholds in real time to reduce exposure and strengthen oversight.



Customer Insights

Understand clients more deeply, identify growth opportunities, and personalize engagement strategies across channels.



Profitability

Track revenue and cost drivers across business lines to maximize returns and improve margin visibility.



Benefits

- **Unified Data Across Systems:** Blend CRM, risk, and transaction data into one trusted view-eliminating silos and ensuring enterprise-wide visibility
- **Real-Time Risk Oversight:** Stay ahead of compliance thresholds with live dashboards and Tableau Pulse alerts that surface critical changes the moment they occur
- **Portfolio Visualization:** Drill into client, product, and regional performance through interactive dashboards that bring portfolio insights to life
- **Predictive Insights:** Model forecasts, loan risk, and investment scenarios with integrated analytics that improve planning and decision-making
- **Self-Service with Governance:** Empower advisors, -analysts, and -executives-to explore data securely at scale-balancing autonomy with enterprise control



Performance & Forecasting

Align actuals, budgets, and forecasts through interactive dashboards that connect finance, operations, and strategy.



Fraud Detection

Spot anomalies faster and prevent financial crime by combining transactional data with predictive analytics.



Portfolio Management

Visualize and optimize portfolio performance to balance risk, return, and diversification.



Operational Efficiency

Streamline reporting and analytics processes to boost productivity and reduce manual effort.



Learn more at argano.com

Ready to unlock smarter insights across your financial organization?
Contact us at connect@argano.com to learn how Argano and Tableau deliver trusted analytics that power better decisions, stronger compliance, and sustainable growth.

