

CASE STUDY

## How Tradesman Insurance Transformed Analytics With a Modern Cloud Data Warehouse

In a \$2.1 trillion U.S. construction insurance market, Tradesman Insurance needed a unified data warehouse to streamline reporting, reduce operational risk, and strengthen decision-making. Serving small businesses in a high-risk industry, the company relied on timely, accurate data to improve service delivery and customer retention. To overcome fragmented systems and slow reporting cycles, Tradesman partnered with Data-Sleek to modernize its analytics infrastructure and enable real-time visibility across the organization.

### The Challenge:

#### Fragmented Analytics Slowing Decisions

Tradesman Insurance faced several barriers that created operational risk and limited agility:

- Fragmented data causing delayed reporting
- Disconnected systems forced analysts to manually consolidate data, slowing delivery of critical insights.
- Limited KPI visibility for leadership
- Executives lacked real-time performance metrics needed to monitor service efficiency and customer engagement.
- Incomplete customer insights reducing retention
- Missing visibility into policy cancellations and service drop-offs made it difficult to intervene proactively.
- Manual reporting consuming analyst time
- Teams spent hours on repetitive reporting tasks rather than strategic analysis.

These challenges created urgency: without a unified data system, Tradesman risked operational inefficiencies, missed growth opportunities, and reduced stakeholder confidence.



### The Solution:

#### Strategy & Unified Data Platform

#### Strategy & Approach

When we met with Tradesman, Data-Sleek first needed to understand how their various Insurity systems interacted and where data gaps were slowing the business. Our strategy sessions focused on mapping these workflows and determining how to centralize their data into Snowflake in a way that supported measurable outcomes like faster reporting, better client retention insights, and improved operational decision-making.

Instead of prioritizing speed or scalability, we focused first on quality and accuracy. Modeling the data correctly was essential to ensuring Tradesman had trustworthy metrics, reliable insights, and a foundation their teams could confidently build on.

#### Implementation

- **Snowflake:** Centralized all data sources into a single, reliable warehouse, eliminating silos and creating a unified data environment.
- **Fivetran + dbt:** Automated data ingestion and transformation pipelines to structure datasets according to Tradesman's business logic. Using PrivateLink, we securely connected to their MS-SQL environment and streamed data into Snowflake, eliminating manual work and ensuring accuracy.
- **Tableau:** Developed role-based, interactive dashboards that are fully printable and shareable, with filters and segmentation enabling teams to drill into customer trends, such as service drop-offs and policy cancellations.

**Result:** A 100% unified BI system delivering real-time insights, empowering stakeholders at every level to make faster, data-driven decisions.

#### Technology & Enablement

Teams received hands-on training and ongoing support, fostering a data-driven culture and ensuring adoption of the new tools. Staff could now independently explore metrics and integrate insights into day-to-day decision-making.

## Key Deliverables

- **Unified Data Architecture (Snowflake)**  
→ enabled a single source of truth for all teams
- **Automated Data Pipelines (Fivetran + dbt)**  
→ reduced manual reporting by 90%
- **Centralized Dashboards (Tableau)**  
→ increased KPI visibility 3x, enabled real-time analysis of customer behavior
- **Role-Based Training & Enablement**  
→ empowered staff to self-serve and make data-driven decisions
- **Scalable Data Governance Framework**  
→ future-ready platform for growth and new integrations

## Results & ROI

### Short-Term Impact:

- **90% reduction in manual reporting**, freeing analysts to focus on strategic priorities.
- **3x increase in KPI visibility**, giving leadership and operational teams timely access to critical metrics.
- **Real-time customer behavior insights**, helping identify and address service drop-offs and policy cancellations.
- Full centralization of reporting, eliminating inconsistencies and data silos

### Long-Term Benefits:

- Scalable architecture supports future integrations and emerging technologies.
- Data-driven decision-making strengthens operational agility, stakeholder confidence, and investor trust.
- Empowered teams can now independently explore insights, fostering a culture of data literacy and innovation.

Tradesman now operates with faster, smarter, and more efficient workflows, able to monitor key business indicators and respond proactively to market dynamics. The company is positioned to capitalize on growth opportunities, improve client retention, and maintain a competitive edge in a high-risk industry.

## Lessons Learned / Industry Insights

- **Centralizing analytics accelerates adoption:** Unified platforms reduce reliance on manual reporting.
- **Visualization from day one ensures user buy-in:** Interactive dashboards drive engagement and operational efficiency.
- **Data governance is critical for scalability:** Structured, modeled data enables reliable future growth.

## Conclusion

With a unified data warehouse in place, Tradesman has turned analytics into a core competitive advantage. The company now operates with real-time insights, faster reporting, and a scalable architecture ready for predictive analytics and proactive risk modeling.



## About Data-Sleek

Data-Sleek® is a consulting agency and a leading provider of comprehensive data management solutions. We specialize in data transformation, data migration, data integration, data architecture, data warehousing, and database consulting. Our commitment to client satisfaction empowers organizations of all sizes to unlock the full potential of their data assets. Data Sleek is a trusted partner of Fortune 500 companies, dedicated to innovating and revolutionizing the way you do business.

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