Fivetran for Financial Technology

Fivetran and the modern data stack allow financial technology companies to save engineering time, reduce turnaround time for analytics projects, and foster a culture of data-driven decisions. Read about the results achieved by companies whose products range from financial solutions for business to personal investment

spendesk

Fivetran

snowflake

Looker

Saving Engineering and Analyst Resources

Paris-based Spendesk is an all-in-one spend management solution that gives finance teams full control and visibility over company spending.

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Challenges

- Company was growing and using more and more applications
- Traditional pipeline solutions required too much manual configuration and maintenance

Solutions

- Fivetran data connectors: Hubspot, Intercom, MongoDB, MySQL RDS, PostgreSQL, Salesforce, Zendesk
- Data warehouse: Snowflake
- Transformation layer: dbt
- BI tool: Looker

"We have freed up half of the time of our data analysts that was previously dedicated to ad hoc reports and data extraction. The breadth of data we now have enables the team to work on proactive and deeper analysis. They're data partners for the other teams in the organization."

– Damien Maillard, Lead Engineer

40 hours
of engineering time saved per week

Key Results

- Save the time equivalent of a full-time engineer
- Perform deeper, more comprehensive analysis
- Use reliable, up-to-date data to produce a dashboard to assess the business impact of COVID-19
- Create self-service data stack, enabling various teams within the company to answer questions and set metrics

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CASE STUDY

Measuring Social Impact and Partner Health

Kiva is an international nonprofit dedicated to expanding financial access to unbanked and underbanked communities worldwide.

Challenges

- Existing data warehouse solution required constant monitoring from a full-time engineer

- Loading data from MySQL operational system to data warehouse took an entire day

Solutions

- Fivetran data connectors: MySQL, Snowplow, Salesforce

- Data warehouse: Snowflake

- BI tool: Looker

"We've moved from analytics to building out a data science team. My favorite part of Fivetran is that I never saw the ETL process – it's pretty invisible and it just works."
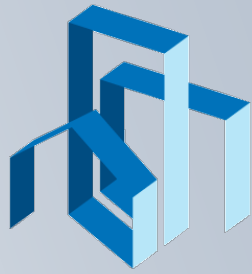
– Melissa Fabros, Software Engineer

Data sync

turnaround changed from one day to constant stream

Key Results

- Changed data sync turnaround time from one day to constant stream

- Able to connect web event and transactions data to assess what inspires people to send funds

- Promote self-service analytics mentality instead of waiting for reports

- Now able to measure social impact and partner health

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EXPORO

CASE STUDY

Empowering Teams With Business Intelligence (BI)

Exporo is a real estate crowdfunding investment platform that allows anyone to easily and transparently invest in real estate.

Challenges

- Understanding and maintaining pipelines from API endpoints became difficult and unsustainable as the organization continued to grow
- Members of the organization wanted to use data to drive decisions but were bottlenecked by BI team

and add new data sources

Solutions

- Fivetran data connectors: Aurora MySQL, Asana, AWS Lambda, DynamoDB, Facebook Ad Insights, Google Ads, Google Sheets, Microsoft Advertising, Salesforce, SFTP, Taboola, Webhooks
- Data warehouse: Snowflake
- BI tool: Looker

"The real benefit of Fivetran is that people can refocus their time and maximise the value of data. We can now build more comprehensive analysis more quickly. Our focus is on data modelling and data analysis versus ETL."

– Gustavo Rada, Head of BI

50%

of engineering time regained

Key Results

- Saved half of previous engineering time
- Integrated wide range of sources, including custom sources using Lambda functions
- Doubled active Looker users across organization
- BI team now freed up to work on higher-value projects

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Learn more at **fivetran.com →**

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Google Big Query

Metabase

PLEO

Building Marketing & Performance Dashboards

Pleo is a Danish smart company card solution that decentralizes company spending, automates expense reports and reimbursements, and simplifies bookkeeping.

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Learn more at **fivetran.com** →

Challenges

- Growing rapidly and adding new data sources
- Data pipeline maintenance accounted for half of a full-time employee's time

Solutions

- Fivetran data connectors: Facebook Ad Account, Facebook Ad Insights, Twitter Ads, Google Ads, HubSpot, Intercom, Linkedin Ad Analytics, Stripe, Webhooks
- Data warehouse: BigQuery
- BI tool: Metabase

"Fivetran has freed up our data engineers to work on building out a beautiful BI infrastructure with clean transformation layers on top of the raw data. By running transformations on raw data, we can load our queries faster, cleaner and ultimately scale our business in a better way."

– Jakob Kristensen, Product Manager

Fivetran does the work of

3

full-time engineers

Key Results

- No longer have to hire three additional engineers
- Create multi-touch attribution model by comprehensively integrating marketing data
- Engineers can build transformations and supporting infrastructure rather than extraction and loading pipelines
- Every salesperson now has a personal dashboard

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Learn more at **fivetran.com →**

Building Marketing & Performance Dashboards

Square is a disruptive payment processing company used by retailers and small businesses everywhere.

Challenges

- Growing rapidly by adding partners and building first-party solutions that produce data; needed a tool to comprehensively integrate data from all sources

- Engineers stuck constantly maintaining data infrastructure built by others

Solutions

- Fivetran data connectors: MySQL, Salesforce, Snowplow

- Data warehouse: Snowflake

- BI tool: Looker

"When you're able to relieve yourself of the pressure of ongoing maintenance overhead of data plumbing, you can be so much more impactful to the organization. As we add partners and build out 1st-party solutions to address business needs, our infrastructure demands have increased and we have found a partner that can scale their capabilities alongside us."

– Guli Zhu, Head of Marketing Analytics

All global partners

Data Integrated

Key Results

- Fully integrated marketing data from global partners

- Real-time data syncing in the data warehouse

- Data engineers and analysts can focus on higher-impact initiatives rather than maintaining legacy work

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