

## **A major financial services firm deploys Datawarehouse**

### **The Client**

A major financial firm with a portfolio expanding brokerage services, investment banking and other financial and investment interests.

### **The Challenge**

The Client wanted to derive maximum mileage from its data that was sitting in its huge databases. By doing this the client wanted to change direction from product-centric to customer-centric. Currently client's customer and product data are scattered in different technologies and applications. Client decided to present a single view of its customer and product data to its center agent to augment the transaction process.

- Understanding the customer pattern. Basically, when a customer calls, the agent should be able to understand the customers transaction history and timelines and service the customer better.
- Single view of products. This includes, presenting brokerage services, investment banking and services to the customer from a single application.
- Identify customer centric offers and present them when customer calls. Able to advise the customer to choose right product and service.

### **The Solution**

Tasmea's DW/BI team after an assessment of the technical situation and the pressing business need of quick delivery of solutions, decided on a federated ROLAP architecture. However, explicit care was taken to ensure that the key dimensions were conformed to across the data marts. This forethought helped in easily providing a cross-profit-center view when the organization went through a profit-center consolidation. The EDW is made up of a granular operational data store and a data warehouse. The large EDW has more than 1000 measures and many dimensions with an huge list of ETL categories loading data.

The solution resulted in:

- Enhanced control leading to reduced turnaround time and improved customer service.
- Improved sales force management by more proactive progress tracking as compared to the inefficient reactive end of the period review.
- Improved forecast accuracy.
- Cross-profit-center corporate view of the business based on unified business semantics.

### **The Technology**

- Developed in Data Stage Version 4.2 and later migrated to Version 6.0 Initially developed in Oracle 8i and later migrated to Oracle 9i Oracle Express / Oracle Sales Analyzer / Oracle Financial Analyzer and Business Objects Version 5.0 Oracle 9i Portal, SharePoint Portal Server