

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