

# InfoSTEP Case study

## Data Integration for a Global Financial Leader



### Fast Facts

#### COMPANY

- Launched in 1982, the company pioneered in online Investing & Trading, banking and financial services industry serving millions of customers globally.

#### TYPE

- Public

#### LOCATION

- New York City, USA

#### INDUSTRY

- Financial Services

#### PRODUCTS

- Global Trading & investing,
- Banking & credit cards,
- Retirement & planning

#### REVENUE

- USD 3.13 billion

#### NET INCOME

- US\$ 0.51 Billion

#### EMPLOYEES

- 3,249 (2009)

#### PROJECT HIGHLIGHTS

- Built an enterprise wide reporting analytics helping the Client to get 360 degree view of their data
- Moved from their point solutions of information delivery, integration and data integrity to a broad data and technical foundation for higher order analytics

### CUSTOMER PROFILE

The customer is a global financial leader, delivering value and innovation services to 4.5 million customers worldwide. Its financial solutions include a suite of online trading, investing and banking products.

### BUSINESS CHALLENGE

- Data Dependency:** Data structure and available tools forced the business to rely on a limited number of resources to obtain data, reports and analysis from the customer information warehouse.
- Disparate data sources:** Inconsistent data sources (external data, MS-Excel spreadsheets, flat files)
- Inconsistency:** Inconsistent data definitions, restricted ability to arrive at the appropriate level of granularity across various dimensions
- Process Non-uniformity:** Lack of uniform reporting processes and procedures
- Inadequate documentation:** Documentation is inadequate considering the manual process



### SOLUTION

InfoSTEP has conducted a phase wise requirements gathering program to have in depth knowledge of the challenges and through the expertised professionals IIPL has delivered industry's best ValueInnovation solution to the client.

- InfoSTEP played a key role by identifying 350 key metrics and by creating complete and clear definitions, housed in a corporate data dictionary
- Implemented SAP Business Objects XI-R2 reporting platform on DB2 databases
- Migrated from a system driven data model to a business driven data model
- Reports were scheduled and delivered via each users portal and/or email
- Identified consistent data sources

### BENEFITS

- Drill Down capability:** Users attained ability to drill into reports for further analysis
- Operational Efficiency:** Analysts obtained real-time, user-driven and directed query and output capability.
- Improved Flexibility:** Users achieved ability to create charts and graphs in Business Objects or export to excel
- User Empowerment:** Users gained ability to perform their own drill-down analysis in real-time by selecting new variables, setting filters, and changing dimensions.

OUR UNIQUE VALUEINNOVATION APPROACH HAS HELPED MANY CUSTOMERS

A simultaneous pursuit of High Quality and Low Cost in everything we do!

# InfoSTEP Case study

## Data Integration for a Global Financial Leader



### InfoSTEP Fast Facts

#### EXPERTISE

- 10+ years of Enterprise BI and support expertise
- 5+ years of large scale BI implementations in the Indian market

#### LOCATIONS

- USA, Hyderabad, Mumbai, Australia, Dubai

#### VERTICAL EXPERTISE

- BFSI
- Healthcare
- Telecom
- High Tech

#### STRENGTHS

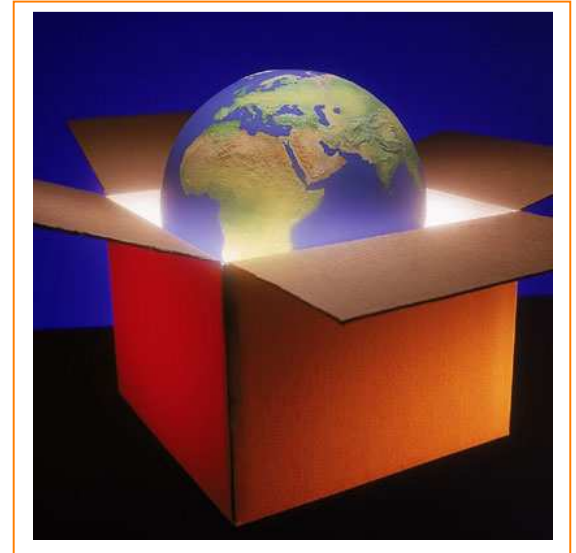
- Enterprise experience and excellent track record in implementing end-to-end BI solutions
- Methodology driven
- Recognized as Business Objects XI R2 Migration Specialists
- Best Solution Provider award (Asia Pac) for 2007

#### CERTIFICATION:

InfoSTEP is an ISO 9001:2008 certified company; certified by ANAB and NABCB.

### About InfoSTEP

InfoSTEP is a global solutions company specializing in Business Intelligence, Data Integration, MDM, and Emerging Technologies. InfoSTEP is a pioneer in providing Business Intelligence solutions across all the segments in the industry. Using a global delivery model and process innovation we provide unique valueInnovation to our customers.



#### InfoSTEP Inc. US

2350 Mission College Blvd  
Suite 290  
Santa Clara, CA 95054  
PHONE: +1 (408) 980-2500  
[sales@infostep.com](mailto:sales@infostep.com)  
[www.infostep.com](http://www.infostep.com)

#### Hyderabad, India:

No.507 Ashoka My Home Chambers,  
Sardar Patel Road  
Secunderabad - 500 003,  
Tel: +91 40 30586000  
Fax: +91 40 66203500  
Email: [sales.india@infostep.com](mailto:sales.india@infostep.com)

#### Mumbai, India:

Golden Chambers,  
No.413, 4th Floor,  
Opposite Lakshmi Industrial Estate,  
Andheri (W), Mumbai- 400052  
Tel: +91 22 40109352  
Email: [sales.india@infostep.com](mailto:sales.india@infostep.com)

OUR UNIQUE VALUEINNOVATION APPROACH HAS HELPED MANY CUSTOMERS

A simultaneous pursuit of High Quality and Low Cost in everything we do!