

# InfoSTEP - Case Study

BI solution for a Global Financial Services Leader



## CUSTOMER PROFILE

A global financial services leader, delivering value and innovation to 4.3 million customers worldwide, in brokerage, banking and lending service areas.

## 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. This resulted in an extensive work queue and it was generally agreed that the previous process was not meeting the needs of the business.



- **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:** Lack of proper documentation

## SOLUTION

- Client chose InfoSTEP as consultants services partner for defining the needs, recommending solution as well as implementing it.
- InfoSTEP played a key role by identifying 350 key metrics and by creating complete and clear definitions, housed in a corporate data dictionary
- Implemented 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

## OBJECTIVE

- Create a consolidated platform for facilitating enterprise reporting and analytics across retail and institutional lines of business.
- Provide business with web-based access to dashboards and reports.
- Build a user-driven infrastructure for query, output and analysis.
- Allow business & financial analysts the ability to perform value-added analytics as opposed to ad-hoc queries and ongoing reports.

## BUSINESS 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!

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## 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

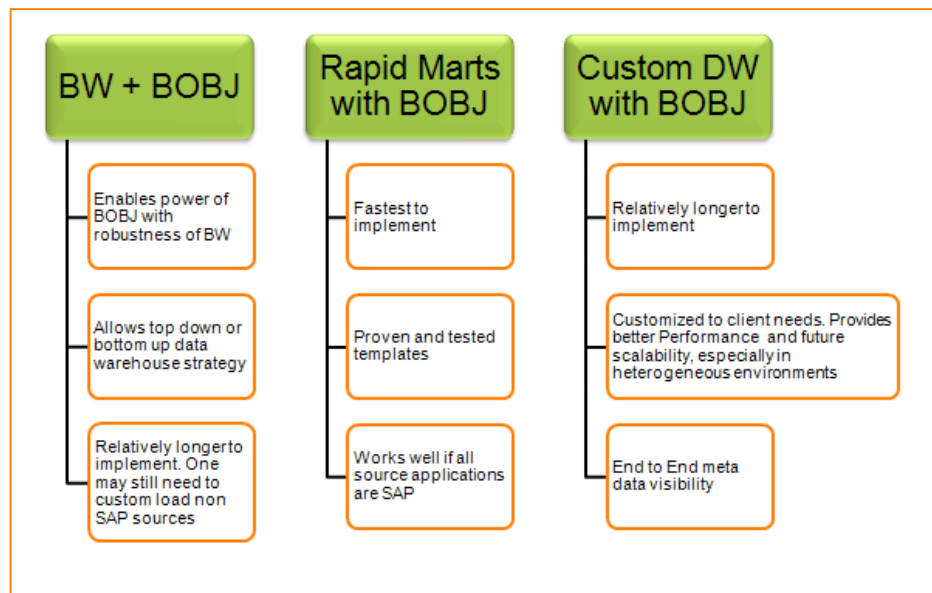
### CERTIFICATION:

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

## 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.

## BI Best Practices



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