

## Business Intelligence Solution for a Financial Organisation

### CLIENT OVERVIEW

This client of DigiQuill has a proud record of being one of the top investment managers in South Africa. With R330 billion assets under management and administration, they are the leading Unit Trust Company. They offer a range of investment solutions to both individuals and institutions.

### CUSTOMER REQUIREMENTS



Our client required a centralised platform for reporting and analysis. The organisation also wanted to improve their data-driven decision making capability at both operational and strategic levels.

Their legacy reporting solutions focused on specific business areas and products, offering only limited perspectives and insights. Business executives needed a solution that provided a global view of business activity and performance. This solution was also required to consistently and intuitively navigate through to detailed information.

### SOLUTION & RESULT

The DigiQuill project team places significant emphasis on a thorough analysis phase to understand the business and to define processes and concepts that would be intelligible to the entire organisation.

An enterprise data warehouse solution was implemented; encompassing the Wealth Management and Asset Management business divisions of our client. The two business areas were approached as two separate data marts.

#### Wealth Management:

This division focuses on the 'ordinary' investor, typically buying into a unit, trust or endowment type investment vehicle. Investment products sold include those of other fund managers. The Wealth Managers data mart is populated with transactional and investment (holding) data on a daily basis. The data sources are Oracle databases. Reports are exposed to all levels of the organisation, from executives to broker consultants via a SharePoint portal. Adhoc pivot table access to OLAP cubes is provided to key users. Ultimately the solution provides this division with an intuitive and flexible mechanism to monitor key metrics (Growth, Profitability, Client churn) from various perspectives (Regional, Broker Consultant, Fund Class).

#### Asset Management:

This division's data mart is used primarily for strategic analysis. A customised web-driven application was developed to generate native Microsoft PowerPoint presentations using data from the warehouse. This tool is a powerful instrument for quickly assembling and preparing presentations for key clients.

