InfoCepts

Client Reporting and Performance Management Portal for Bank Relationship Managers

Type of Project:

Reporting and Web Customization

Technologies:

MicroStrategy, Oracle CRM, MicroStrategy SDK

Team Size:

13 InfoCeptians, 7 Customer Associates

Our Roles:

Business Analyst, MicroStrategy Development, Data Base Architects, Administrator and QA

Users:

Relationship Managers, Senior Management

Executive Summary:

For this customer, the Client Coverage Group of a Wholesale and Retail bank, we developed a one stop shop portal for their Relationship Managers - to view, onboard and manage clients and their data. Our team helped the customer migrate from Excel-based reporting that relied on multiple sources to an automated tool for client reporting and performance management. It provides actionable insights to Relationship Managers by monitoring key business KPIs. Our customer won a top award at the 2012 Asian Banking & Finance Wholesale Banking for this portal

Business Challenge

A commercial banking Relationship Manager is responsible for managing a financial institution's corporate clients. Their many daily activities include originating and on boarding new clients, assisting their clients with capital needs, understanding their client's industries and issues and managing their investments.

For a Relationship Manager to be successful in this role, they need data that typically comes from a variety of sources. This includes internal transactional systems as well as external sources such as financial market data. Our customer, the Client Coverage Group at a leading global financial institution with over $500B in assets, was struggling to provide its Relationship Managers (RM) with the data they needed, causing their RMs to:

- Spend excessive time on-boarding new clients
- Frequently miss their client Service Level Agreements
- Have to pull data from multiple systems for a complete view of their clients
- Use Excel for their analysis resulting in inconsistent results and incomplete analysis
- Lack trust in the data that they were delivering to their clients

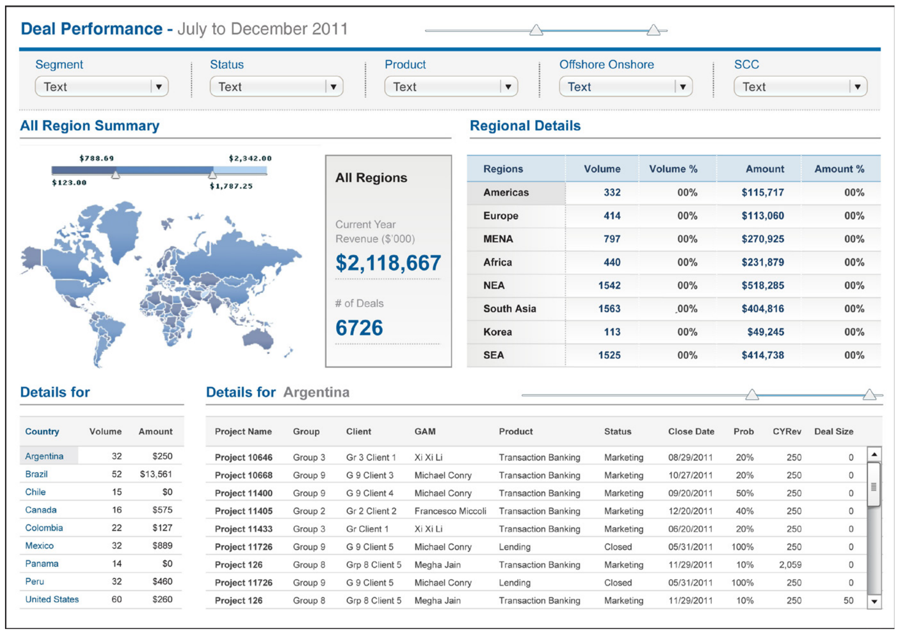
Adding to the challenges the RMs were facing, management also struggled with getting a complete and quick view of their team's performance.

The Program Director of Technology initiatives for the Client Coverage Group came to us to help them design and implement a system that would overcome these challenges. In addition, our customer needed a system that would be far more reliable, scalable, flexible and robust to meet the diverse needs of RMs and their clients. They wanted a one-stop-shop portal for their RMs that would allow them to communicate with each other, get the information they needed, run their analytical reports, on-board and manage clients, and view client data. Their goal was to make this portal the sole reference for all client-related queries and analyses for both RMs and Senior Management.

How We Helped

We helped our customer develop a Relationship Manager portal that is used by thousands' of RMs and the Management Team. It provides integrated functionality in three distinct areas:

- **Social:** Via this section of the portal, a blend of LinkedIn, Facebook and Twitter, RMs can interact with each other to discuss client opportunities and to share ideas
- **Client Reporting:** This section provides RM performance reporting and client specific reporting
- **Tasks:** This section provides the RMs with the means to manage their clients by providing a new way of submitting, managing and tracking service requests, including being able to effectively on board new clients



During the course of the engagement, our team helped the customer with consulting, design and development of the client reporting portal, on the MicroStrategy platform. Since MicroStrategy reporting was embedded into an overall RM portal, the engagement involved numerous customizations

Overall:

- Provided consulting services, using our methodology and templates, to review the design and architecture of the portal
- Designed a scalable architecture to extract and model data from multiple data sources
- Our data visualization experts designed and developed seven MicroStrategy interactive Dashboards (available online and offline) in the areas of Revenue Analysis, Under Performing Clients, RM Call Details, Client Lending Portfolio and Tier 1 Clients, The reporting provided detailed trend analysis by region, country, product segment etc.
- Created the processes necessary to automate data quality validation. Considering the customer didn't have a Data Warehouse for the RM Portal and the data was sourced directly from the transaction systems, we build in quality control mechanism to ensure sanctity and quality of the existing data

MicroStrategy Customizations:

- MicroStrategy reports were integrated into the overall portal using the MicroStrategy Web SDK. Functionality provided included auto response to MicroStrategy prompts based on user selections in different sections of the portal
- Seamless integration between the RM web portal and MicroStrategy reports and dashboards, by using MicroStrategy's URL API. Reports are saved and deleted directly in the application instead of MicroStrategy.
- Customized the look and feel of the MicroStrategy OLAP Services interface elements and MicroStrategy reports as per our customer's corporate standards

- Customized the MicroStrategy tool bar to add a custom help button
- Implemented data security on the database. A complex database function was created to fetch the list of Clients mapped to a RM, based on the RM's role. This list acts as an input to the MicroStrategy Dashboard for calculations

High ROI BI Delivered

As a result of this effort, we delivered a highly scalable, reliable and flexible new system to our customer that provided the following benefits:

- Marked increase in the time Relationship Managers get to spend with their clients. The Portal provides the RMs with all the client reports and dashboards they need to take the right actions for their clients, thereby almost eliminating the time they spend finding and mining customer data

- Increased client wallet share by up-selling and cross-selling. The RM Portal integrates data from various internal and external sources and provides a "single view of the client", helping RMs analyze and target client specific solutions

- Provides Management with the reports to track and measure performance down to the level of an individual RM. It also provides them with reports on contribution and performance of top clients.

- Significant improvement in meeting client SLAs

About InfoCepts

Since 2004, InfoCepts has delivered on the promise of Business Intelligence. Our consulting capabilities and process oriented approach, with world class governance frameworks have delivered high quality solutions to our customers. Our technology specific methodologies and global delivery model provides exceptional ROI for our customers. Our services include high quality Mobile Apps, award winning Dashboards and end-to-end business intelligence development and support using a host of technologies.

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