InfoCepts

Client Reporting and Performance Management Portal for Bank Relationship Managers

A global financial institution's client coverage group needed an efficient, automated system to use to view, onboard, and manage their clients and all related data. InfoCepts developed an award-winning one-stop portal that enables managers to monitor key performance indicators, instead of relying on Excel-based reporting from multiple sources.

At a Glance

PROJECT
Client Reporting and Performance Management Portal

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
- QA

USERS
- Relationship Managers
- Senior Management

Business Challenge

Commercial banking relationship managers (RMs) are responsible for managing a financial institution's corporate clients, and their daily activities run the gamut of originating and onboarding new clients, assisting clients with capital needs, understanding the client's industry and issues, and managing client investments. For relationship managers to be successful in this role, they need data from a variety of sources, such as internal transactional systems and external sources like financial market data.

Our customer, the client coverage group at a leading global financial institution with more than $500 billion in assets, struggled to provide its relationship managers with the data they needed.

This, in turn, led to many problems and setbacks — and caused their RMs to:

- Spend excessive time onboarding new clients
- Fall short of meeting their client service level agreements
- Inefficiently pull data from multiple systems to get a complete view of their clients
- Rely on Excel for their analysis
- Distrust the data they delivered to clients

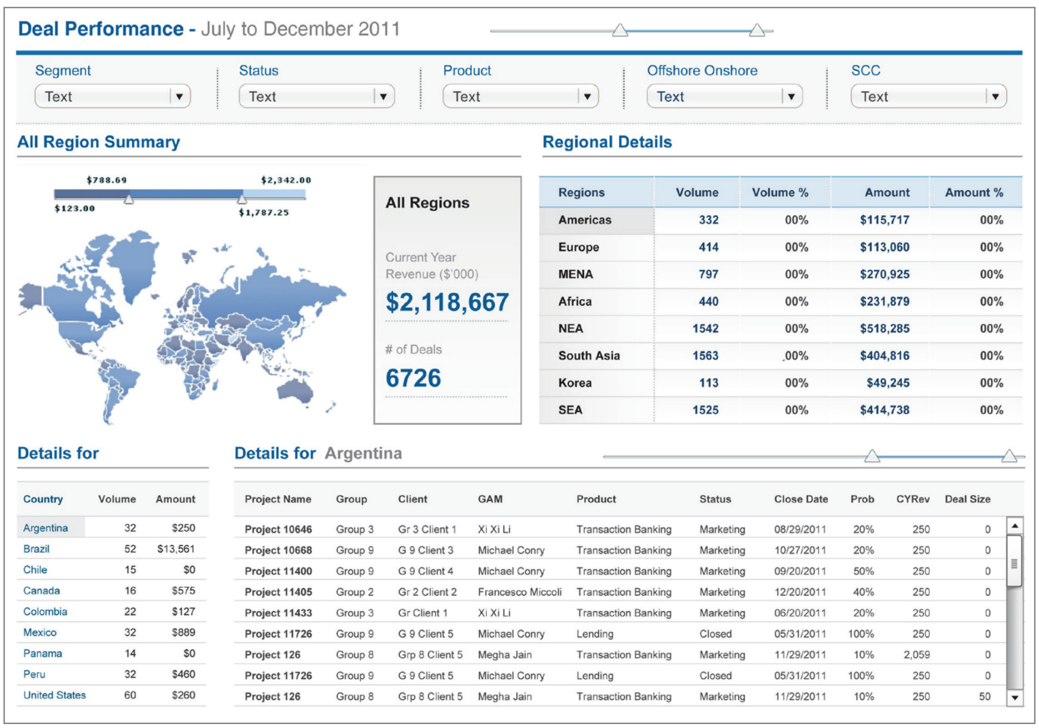
With these problems came others. Namely, the company's management team needed to be able to see at a glance a comprehensive view of each RM's performance, but the current set up made it impossible. The program director of technology initiatives reached out to InfoCepts for help designing and implementing a system to overcome these challenges — and create a scalable, flexible one-stop portal to meet the diverse needs of RMs, their clients, and the company's senior management team.

How We Helped

We worked closely with our customer to understand the company's core needs and to develop a relationship manager portal that improves the efficiency and effectiveness of thousands of RMs and the management team.

The portal provides integrated functionality in three distinct areas:

- **SOCIAL:** The "social" section of the portal blends LinkedIn, Facebook, and Twitter, allowing RMs to discuss client opportunities and share ideas.
- **CLIENT REPORTING:** This section features customized RM performance reporting and client specific reporting.
- **TASKS:** In this section, RMs can submit, manage, and track service requests — and better manage existing clients and onboard new ones.



Deal Performance - July to December 2011

Segment: Text | Status: Text | Product: Text | Offshore Onshore: Text | SCC: Text

All Region Summary

All Regions

Current Year Revenue ($'000)

$2,118,667

# of Deals

6726

Regional Details

Regions	Volume	Volume %	Amount	Amount %
Americas	332	00%	$115,717	00%
Europe	414	00%	$113,060	00%
MENA	797	00%	$270,925	00%
Africa	440	00%	$231,879	00%
NEA	1542	00%	$518,285	00%
South Asia	1563	,00%	$404,816	00%
Korea	113	00%	$49,245	00%
SEA	1525	00%	$414,738	00%

Details for

Country	Volume	Amount
Argentina	32	$250
Brazil	52	$13,561
Chile	15	$0
Canada	16	$575
Colombia	22	$127
Mexico	32	$889
Panama	14	$0
Peru	32	$460
United States	60	$260

Details for Argentina

Project Name	Group	Client	GAM	Product	Status	Close Date	Prob	CYRev	Deal Size
Project 10646	Group 3	Gr 3 Client 1	Xi Xi Li	Transaction Banking	Marketing	08/29/2011	20%	250	0
Project 10668	Group 9	G 9 Client 3	Michael Conry	Transaction Banking	Marketing	10/27/2011	20%	250	0
Project 11400	Group 9	G 9 Client 4	Michael Conry	Transaction Banking	Marketing	09/20/2011	50%	250	0
Project 11405	Group 2	Gr 2 Client 2	Francesco Miccoli	Transaction Banking	Marketing	12/20/2011	40%	250	0
Project 11433	Group 3	Gr Client 1	Xi Xi Li	Transaction Banking	Marketing	06/20/2011	20%	250	0
Project 11726	Group 9	G 9 Client 5	Michael Conry	Lending	Closed	05/31/2011	100%	250	0
Project 126	Group 8	Grp 8 Client 5	Megha Jain	Transaction Banking	Marketing	11/29/2011	10%	2,059	0
Project 11726	Group 9	G 9 Client 5	Michael Conry	Lending	Closed	05/31/2011	100%	250	0
Project 126	Group 8	Grp 8 Client 5	Megha Jain	Transaction Banking	Marketing	11/29/2011	10%	250	50

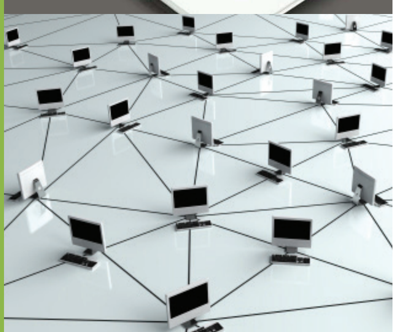
Throughout the engagement, our team used InfoCepts' consulting methodology and templates to review the design and architecture of the portal, and create a scalable architecture to extract and model data from multiple sources.

From there, we developed the client reporting portal on the MicroStrategy platform.

Since MicroStrategy reporting was embedded into an overall RM portal, the engagement involved a number of key customizations.

These include:

- Integration of MicroStrategy reports into the overall portal using the MicroStrategy Web SDK. Functionality included auto response to MicroStrategy prompts based on user selections in different sections of the portal.
- Integration between the RM web portal and MicroStrategy reports and dashboards, using MicroStrategy's URL API. Reports can be saved and deleted directly in the application instead of MicroStrategy.
- Alignment of the look and feel of the MicroStrategy OLAP Services interface elements and MicroStrategy reports with our customer's corporate standards and brand.
- The addition of a custom help botton on the MicroStrategy tool bar.
- Implementation of data security on the database and a complex database function to fetch the list of clients mapped to an RM, based on the RM's role. This list acts as an input to the MicroStrategy dashboard for calculations.



Our data visualization experts designed and developed seven MicroStrategy interactive dashboards (available online and offline) for the following areas: revenue analysis, underperforming clients, RM call details, client lending portfolio, and tier 1 clients. Each dashboard's reporting provides detailed trend analysis that can be sorted by region, country, product segment, and other data fields.

Since our customer did not have a data warehouse for the RM portal and sourced the data directly from the transaction systems, we created the processes necessary to automate data quality validation. This involved building in quality control mechanisms to ensure the sanctity and quality of the existing data.

Enhanced Business Intelligence, High Return on Investment

As a result of this effort, we delivered a highly scalable, reliable, and flexible new system to our customer that provided many essential benefits.

These include:

- A marked increase in the time RMs can spend with clients, stemming from the time-saving features of the reports and dashboards, which eliminate the need to search for and mine customer data.
- Increased client wallet share through up-selling and cross-selling, resulting from the portal's integration of data from various internal and external sources, as well as its "single view of the client," which helps RMs analyze and target client-specific solutions.
- Newly available reports that allow management to track and measure performance down to the level of an individual RM, in addition to other reports that detail the contribution and performance of top clients.
- Significant improvement in meeting client service level agreements.

About InfoCepts

Since 2004, InfoCepts has delivered on the promise of business intelligence and data warehousing. Using leading-edge technologies, we've designed and delivered world-class systems for data syndicators, large global enterprises, and leading software companies. Some of our marquee, world-class projects have included custom BI applications that serve thousands of users, mobile analytics applications used by hundreds of sales professionals, and "big data" initiatives for social media analytics.

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