

Comprehensive BI application to address data analysis & reporting needs



Industry

Mutual Fund

Overview

The plethora of changes taking place on the regulatory front have made the asset management companies (AMCs) understand that they need to reconsider and restructure their businesses offerings in order to meet with the changing needs of their clients. Although the ever emerging Indian markets provide with a wide range of diverse opportunities, it is vital to understand and tap into these avenues to fuel the growth of the industry.

Leading mutual fund provider adopts BI for visual clarity on global operations and ease of use



Client

Client has launched various schemes under which units are issued to the public with a view to contribute to the capital market and to provide investors the opportunities to make investments in diversified securities.

Business needs

- Analyzing data of 7 million customers, knowing them and understanding the behavioral pattern was a challenge for business users. Customer profitability was becoming absolute necessity for Sales Managers
- Speed of delivery - Business users required quicker access to the information for decision making. This was necessary for higher productivity of the business users too
- Business users required information for real-time analysis of the data. This was possible through dynamic reports that could be generated on-the-fly with slice & dice, drag & drop features
- End-users required various consolidated reports for various sales activities and campaigns coming from Karvy, mapping it to the CRM and then preparing reports in Excel

Challenges

- Client involved in doing research for more than 500 companies
- Data generated was growing exponentially leading to challenges in trying to scale current BI solution to generate reports
- IT teams were bombarded with requests to create or modify queries
- Current BI reporting solution would generate static reports from within the application but could not be modified easily
- Other reporting solutions failed to consolidate data and generate interactive reports

Datamatics' Solution

- Datamatics team of experts followed the agile methodology for BI implementation
- Consolidated the data from the various locations and legacy systems to centralized data warehouse
 - Implemented centralized BI system in a couple of days
 - Enabled web access to BI reporting through Citrix server
 - Trained key participants on report creation and manipulation
 - Pre-configured key reports to ensure quicker ROI

Datamatics' Advantage

- Global Information Technology (IT) & Business Process Management (BPM) organization taking you forward on your route to Digital Transformation
- Trusted partner to several Fortune 500 companies globally
- Capabilities built around technology, domain expertise & knowledge of business processes
- Alliances with global technology leaders such as Microsoft, IBM & EMC²
- More than 7,500 employees globally
- Certified for SEI CMMI Level 3 V1.3, ISO 27001:2013 & ISO 9001:2008
- SSAE 16 compliant processes
- Global presence: U.S., UK, Australia, Dubai & India

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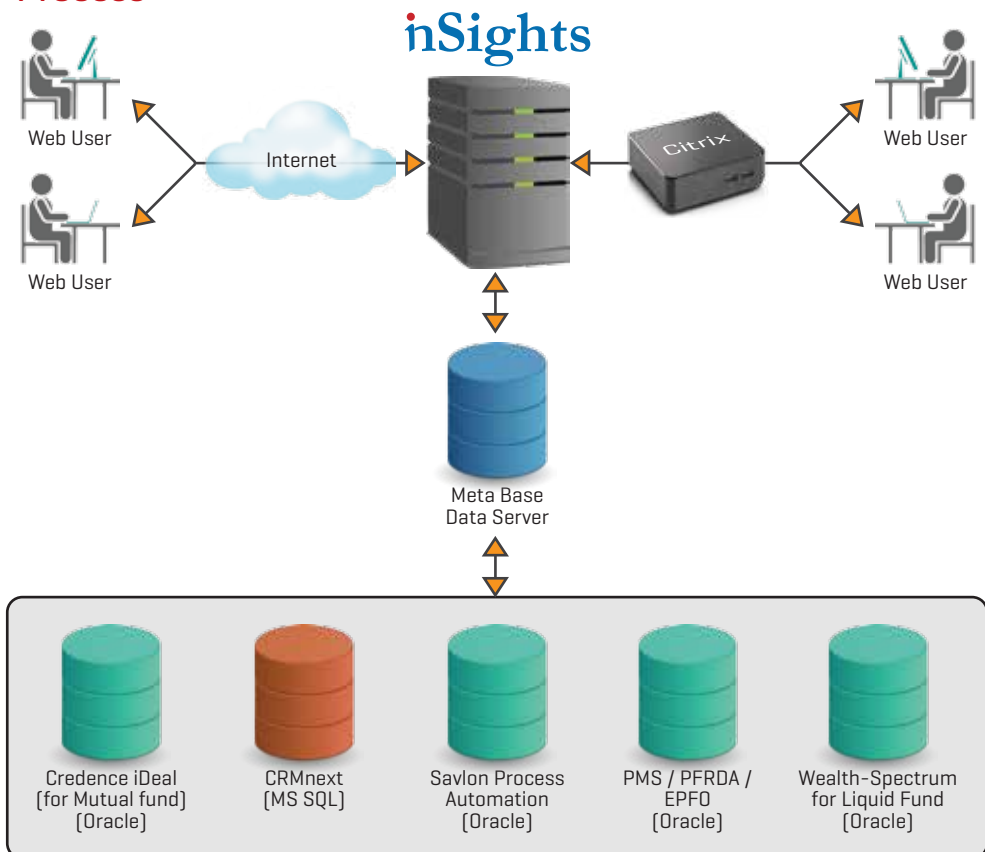
Approach

- Multiple database access was being made available to end-users through nSights BI. The users were identified by the BI team at client based on their requirements and mapping it to nSights
- Consolidation of information across the database - Ideal, CRM, Savion & internal applications including websites
- User Management through Active Directory, which is supported by nSights Deployed on Citrix server for faster deployment and instant access to reports also through Web
- nSights was made a standard interface for all reporting & analysis requirements. This helped us save time & trouble required to build custom reports

Benefits

- Provides complete visibility of information coming across customers, branches, distributors. Client deployed nSights to query & analyze the data, understand the customer behavior
- With nSights, client can now access & interrogate information coming from multiple applications
- Client has dynamic at-a-glance MIS that shows the status of performance across domains to senior management
- nSights is now connected to multiple applications. Time to deliver the report requests is maximum a day or two which included the approvals from the business and IT

Process



Result

Fund Managers are equipped with and are pro-active for a speedy action, better manage costs, and ultimately reduce time-to-market.