



## ▶ Dashboards and Performance Management—Financial Services

In the financial services sector, an online brokerage company had acquired additional lines of business to broaden the products they could offer to customers. The new lines of business included; banking products, consumer loans and home equity lines of credit. Because the acquired organizations had operated as separate entities from the core brokerage business, senior management had no easily accessible insight into their performance, which fell outside of the mainstream brokerage firm.

### Business Challenges

The biggest challenge in designing a dashboard application is the consolidation of hundreds of metrics down to the Key Performance Indicators (KPI's). An intuitive dashboard design was required for the primary audience of senior executives. Information at the business summary level needed to be displayed graphically, with additional links to detail reports. Business analysts also needed access to the same information through ad hoc query and analysis reports. It was vital that information was consistent and all activities had to generate an audit trail for compliance reporting. As a global company with IT centers in the US, the UK and Singapore; Emtec's client required minimal outage to load the data warehouse. They also required external data feeds incorporated into the data warehouse load.

Emtec's first challenge was to lay out a realistic project road map for interim deliverables, and conduct user adoption workshops with the business analysts to ensure dashboard navigation mapped to the key metrics that supported real-time decision making. The initial dashboard specifications required hundreds of metrics - too many to view in a user friendly form.

Emtec dashboard designers collaborated with client business analysts to categorize the business impacts of the metrics, then design the dashboard so the critical metrics were displayed at the top level of the dashboard. The strategic business requirements were relatively simple. The IT infrastructure to meet these business requirements were medium to high in complexity—not uncommon with dashboard applications. Next, functional change had to be closely managed because minor changes in the dashboard can have major technical implications.

### Technical Challenges

There are 2 primary technical challenges that are common to this type of project: adopting a release level approach to deliverables to manage scope creep. Once the functional design and technical specifications were signed off, any change was regarded as a “ver.2” enhancement.

The second challenge was to assemble a project team that included the combined skill sets of Emtec's technical team and the client's business SME's. Emtec understands that the technical deployment—while crucial to the project—is nothing without the client's business understanding.

## Emtec's Solution

### Solution Overview

In order to gain visibility into key metrics to manage the business, Emtec guided and recommended a dashboard and data integration approach to the customer, rather than modifications to the core business applications. In weighing the alternatives, it was determined this approach would be faster to implement, it was lower risk, and it was a lower cost option.

Emtec provided a solution that not only focused on the immediate business requirements but was architected for future business needs. It was dependent on the organizations requirements and not driven by technical requirements. Emtec utilized agile methods for a value-based project development, test and delivery model.

The data infrastructure consisted of a staging area, a data warehouse with 3 years of recorded history, and an audit sub-system. External data was loaded into staging and from there to the data warehouse on a 24 hour schedule. Data quality and data consistency rules were applied as data was loaded. A small number of standard or operational reports were available from the staging area. Emtec enhanced their solution with the incorporation of adoption workshops for a successful dashboard development.

### Project Approach

The project was divided up into 4 work streams:

- Project planning and architecture; including business analysis and business user adoption workshops
- Data infrastructure; including all data related efforts to support business intelligence
- Business intelligence; using an incremental value-based development approach
- Testing, training, deployment and go-live support

### Technologies Deployed

- Business Intelligence—Business Objects XI – Performance Manager, WebIntelligence and Crystal Reports,
  - Ab Initio – GDE & EME, SQL scripts,
  - Source data - DB2, Flat files & XML (external data feeds),
  - Target DW - Teradata
- Integrate single sign-on (SSO) with customer's RSA security implementation.

### Integrating Data Yields Client Benefits

#### Technical Impact

In spending the time to implement a robust production application that was; reliable, secure, scalable and supportable, their data warehouse environment transformed into a single, trusted source for all business intelligence reports. The solution has provided the client a platform for the future. The new options and capabilities in reporting prompted the client to search, review, and report data. The data warehouse unleashed pent up demand for additional business intelligence reports.

#### Business Impact

The business intelligence platform includes dashboards, scheduled production reports and ad hoc queries and analysis, which can also be integrated with Microsoft Office products. As a result of the user adoption workshops, users were primed to embrace the new system and it has become the single trusted view of the organization's business information.

Established in 1964, Emtec, Inc. is a systems integrator that provides IT services and products to the federal, state, local, education and commercial markets. Our market leading value-based management methods, coupled with best-in-class IT technology, consulting and development services, address a wide range of specific client needs, as well as support broader IT transformation initiatives. Emtec's service capabilities span the United States, Canada and countries around the globe.