



## Large Financial Services Company

### ■ Company Overview

The Northridge client related to this case study is a multi-billion dollar publicly-traded Fortune 100 financial services company. The company maintains a diverse group of more than 50,000 employees to support its millions of customers across the globe. The company is an industry-leader that prides itself on growing shareholder value, servicing the evolving needs of its customers, driving corporate responsibility and supporting a number of charitable organizations in the communities it serves.

### ■ Business Challenge

The southeast U.S. region of the client was in need of Business Intelligence (BI) solution that would allow the region to make timely business decisions, quickly react to changing market dynamics, and position itself to win business against its key competitors. The client's business operates in a distributed branch model but the IT functions are centralized at the corporate headquarters. Although a sophisticated BI solution was leveraged at the corporate level, the southeast region's granular market data was not available in the corporate data warehouse and thus the solution didn't provide the needed value for the region.

In order to make business decisions at the regional level, data was being manually aggregated from both the corporate and local branch sources into basic reporting tools such as Microsoft Excel and Microsoft Access. This data aggregation process was time-intensive and prone to human error. Regional leadership in the southeast determined that an automated BI solution tailored to the needs and data streams of the region was needed in order to better compete in the marketplace.

Streamlining and consolidating the manual data collection and reporting processes would drive value for the client by significantly reducing the time required to aggregate and fix data while allowing for more time to analyze the data and make informed business decisions. The direct result of a comprehensive BI solution would be an increase in current and future product sales with an improved profit margin.

### ■ Solution Approach

The Northridge Business Intelligence consulting team engaged in a full strategic assessment of the client's needs and evaluated the tools and processes already in place within the organization. After several weeks of meetings with senior executives and department leaders, the Northridge BI team fully documented the business requirements for a new solution that would accomplish the business objectives. Northridge ultimately recommended Microsoft SQL Server as the BI platform to replace the existing Excel and Access data reporting and analysis solution.

The Northridge BI team developed a central data warehouse through an Extract, Transform, and Load (ETL) process to automate the data aggregation process. Microsoft SQL Server and SQL Server Integration Services (SSIS) serve as the foundation for the data warehouse providing centralized data storage and high-performance reporting, providing the distributed branches with easy access to the data. Northridge then implemented SQL Server Reporting Services (SSRS) to serve the data warehouse information to the client's key managers and decision makers. Northridge implemented Reporting Services Authentication to enable information security within the reports and leveraged the SQL Report Builder component of SSRS to provide the client with ad-hoc reporting capability.

### ■ Results Delivered

The custom Business Intelligence solution designed and developed by Northridge has produced success on a variety of levels for the client. The BI solution automates data gathering from multiple sources, provides visualization and analysis capabilities leading to rapid client insight and competitive response, and has resulted in an estimated 12 times return on investment. The client has immediately realized significant time savings in data collection and consolidation, turning what previously encompassed several weeks of manual data aggregation into an overnight process without error. The client team has gained efficiencies in the reduction of these non value-added tasks thus enabling more opportunity for data analysis and effective decision making. Not only has the solution enabled operational efficiencies across the region, the client has also leveraged the BI solution to drive improvements in marketing and product development.

## Microsoft® Business Intelligence

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