

Business Intelligence/Data Warehouse (BI/DW) Technology Roadmap and Report Rationalization



Background

The client is a *Fortune* 100 investment management company in the USA, has been dealing with redundant / duplicate BI reports. They wanted to understand the pain points and shortcomings in their current BI/DW technology landscape.



Challenges

The challenges encountered by the Trianz team while analyzing the current BI/DW technology landscape of the client are:

- ▶ Data exists in multiple platforms; reporting requires significant amount of manipulations to be done manually.
- ▶ Lack of a widely available & flexible reporting tool which has led to the universe of exponential growth of reports.
- ▶ An inventory of crucial reports are generated and maintained in Excel sheets instead of a standard reporting tool.



Business Execution Approach

The Trianz team has proposed the following execution approach to the client:

- ▶ Consolidate client's investment data from multiple platforms (LMS, Argus, YARDI, NB2, etc.) into a single warehouse for reporting.
- ▶ Re-engineer custom LMS data by performing and maintaining derivations & calculations in RDW.
- ▶ Rationalize the universe of client's business reports; re-build reports through straightforward re-pointing to RDW or through the use of the client's Ad-hoc Reporting Tool.
- ▶ Minimize the use of Excel through Ad-hoc Tool.



Successful Business Results

The execution of the solution proposed by Trianz has achieved the following business results:

- ▶ A consolidated client Data Warehouse for all investment reporting data across all asset types.
- ▶ Re-engineering of client's custom LMS data elements to improve integrity and support growth of complex asset types.
- ▶ A reporting initiative to re-build the universe of client's business reports following a report inventory rationalization process that reduces the inventory of reports.
- ▶ Development of a client's Ad-hoc Reporting Tool as well as consolidated dashboards to maintain reporting efficiency.

About Trianz

Trianz is a dynamic and fast growing firm that helps leaders in client organizations formulate and execute operational strategies to achieve business results from a senior management perspective. With a focus on Business Digitization, Analytics, Cloud Enterprise, Mobility and Cloud Infrastructure, we bring the best of consulting and technology experiences, execution models, and IP to deliver consistent success to clients. With offices in Silicon Valley, Washington DC Metro, New York, Bangalore, Chennai, Hyderabad, and the UAE, Trianz serves a wide range of clients from Fortune 1000 to emerging companies in high tech, insurance, financial services, retail, life sciences, public sector and logistics industries.