

*Client Situation*

Globally scattered data sources; client reporting systems based on basic P&L mark up models; untimely data loading to central database; limited reporting and data access for sales staff. Replacement solution planned as a major 5 year project. However business sponsors were concerned that - although a strong technical solution - it needed greater functional focus and to deliver value earlier in the project life cycle.

*The Request*

Help them to (1) identify all the challenges they needed to cater for that they hadn't thought of and (2) identify ways to fast track their deliverables so they can start to deliver value early. They zoned in on three areas of our methodology but also requested that we touched on other areas:

*Zone In Areas*

- *KPIs, Metrics and Reporting*
- *Operating Model, Control Reporting and Permissioning*
- *Data Model Review*

*Touch On Areas*

- *Reference data hierarchies - product, sales and trading*
- *Product Catalogue*
- *Trade Enrichment and Product Identification*
- *Additional data dimensions - budget, capital, RWA*

*The Process*

- Secure data sharing area set up for key project documents/data
- 3 day Discovery Workshop where we focused on problem areas and demonstrated best practice in those areas
- 8 areas to work on identified with interim and final deliverables
- Follow up working groups developed interim deliverables before final workshops

- Another 3 Day workshop deep diving into each of the identified areas
- Finalised report covering all 8 areas with a total of 10 major actionable recommendations and over 70 detailed actionable recommendations
- We delivered a repository of over 20 key artefacts (e.g. data model overview, sample reports, permissioning model, etc. ) to the shared area

*The Result*

The client has fast tracked their project significantly. As a follow up, we will work with them to take their dashboarding reporting solution live much earlier than planned