

How a data warehousing solution helped a financial organisation extracting more value from data



Introduction

Organizations providing financial services face a seemingly uphill task to keep their data governance and planning efforts moving at the pace of business. They need to centralize the data from several data sources to achieve accurate, actionable reporting on various financial areas including deals, borrowing, and underwriting. Most of these organizations find their existing infrastructure outdated and may realise that it is no longer capable of managing the increased information analysis demands.

Customer Background

- ✓ The customer is a North America based financial services firm specializing in providing small to medium-sized businesses with access to capital.
- ✓ The customer is focused on providing fast access to funding for expansion, working capital, inventory, payroll, marketing & equipment.

Requirement

- ✓ The customer is looking to implement a data warehousing solution to help organization's business owners access to quick and meaningful funding decisions.
- ✓ At present data needed for decision making is scattered across disparate data sources including Excel sheets, line-of-business applications, and different databases.
- ✓ The platform needs to help identify trends and reveal insights that will influence important funding decisions.
- ✓ The data warehousing solution needs to be scalable and one that could handle complex financial issues.

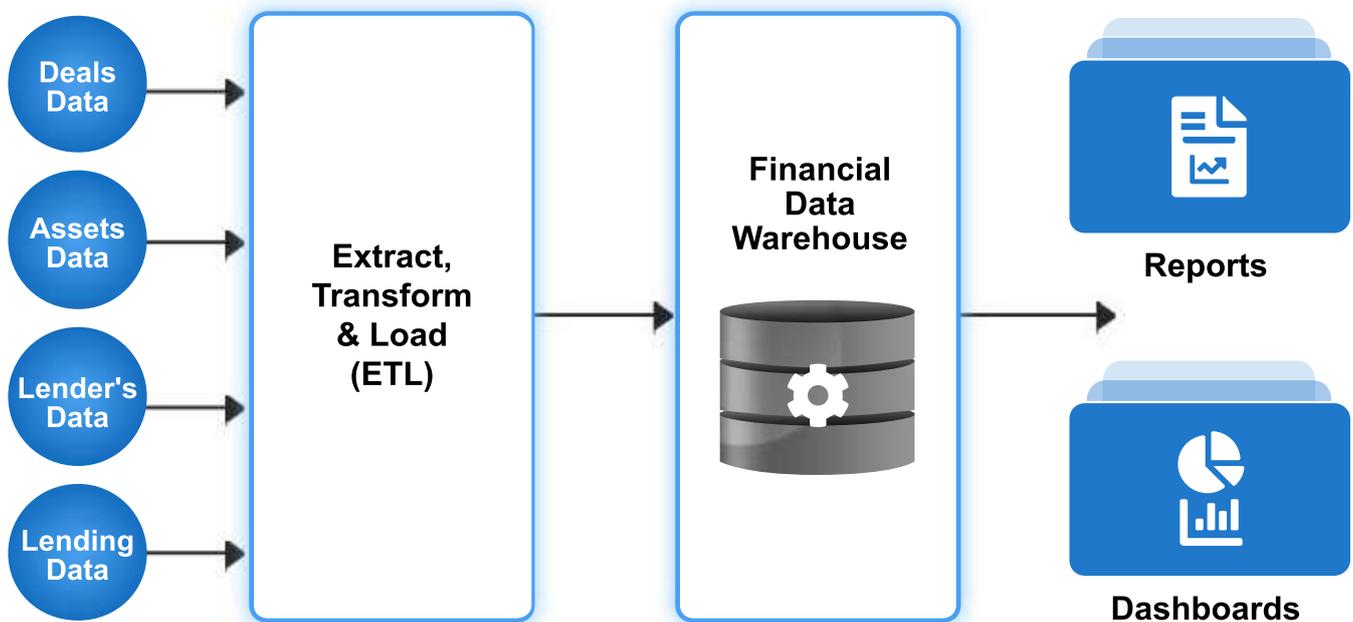
Scope

- ✓ Designing and implementing a data warehousing solution on Domo's integrated business intelligence (BI) platform (<https://www.domo.com>)

- ✓ The data warehousing solution needs to integrate data from several disparate data sources to obtain deals & assets related data and provide reports & dashboards to enable data insights.
- ✓ The solution needs to transform data by applying business logic to show trends in underwriting & risk areas as well in overall lending performance areas.

Solution

- ✓ Aress assigned a team of developers to work on designing and deploying a scalable data warehousing architecture using Domo BI platform:
 - Domo SQL Dataflow was used for integrating data from disparate data sources into Domo data warehouse
 - DoMo Analyzer was used for creating data visualizations, dashboards, and reports from the data in the data warehouse
- ✓ Intuitive dashboards were designed and deployed to focus on key financial topics including funded deals, deal submission, participants, term loan, risks, underwriting & borrowing base
- ✓ In addition, dashboards for overall portfolio performance focusing on size of deals, outstanding receivables, and profitability of deals by geography were implemented
- ✓ The processed data was picked from the data warehouse for visualization purposes to show hidden trends



Business benefits

- ✓ Making better decisions - Using the Aress data warehousing solution, business owners at the financial organization can now make more informed decisions leading a drop in lending costs and improved operations sales growth.
- ✓ A scalable data warehousing solution - Aress developed and deployed a data warehousing solution meet the strict data analysis requirements of the business owners/ executive team and ensured that the solution is scalable to address future needs.

**Modern data warehouse enables financial services organization
with speed and reliability**