incedo

Empowering a leading broker-dealer firm with advanced cloud-based operational analytics

Key Challenges

- Heavy reliance on production servers created bottlenecks in analytics and reporting

- Intraday reporting gaps delayed responses to operational events and advisor requirements

- Lack of insights into advisor activities and process delays limited optimization efforts

Business Solution

- Designed scalable Snowflake cloud data warehouse using diagnostics and data lineage mapping

- Built robust data pipelines with Fivetran and DBT for end-to-end automation

- Established reusable code patterns and CI/CD framework for agile, aligned data practices

Business Impact

80%
reduction in infrastructure cost

5%
YOY improvement in advisor and investor experience metrics

50%
reduction in call volume and elimination of intraday reporting delays

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