

## *Redefining Data to Visualization Journey of a Large US-based Independent Broker Dealer with Data Innovations*

### The Big Picture

The client is the second largest brokerdealer network in the US, with users spread within and outside the enterprise network. The client lacked executive view across the business network. They needed help with the distributed data that was making it impossible to view key metrics, gain insights, and simulate “what-if” scenarios. They wanted to improve the sub-optimal mobile features in the existing BI platform while dealing with the increasing cost of 3<sup>rd</sup> party tools, high time to market for reporting requests, and poor user experience with reports. With a lack of targeted delivery of services and products to advisors and investors, along with the desire to improve the sub-optimal client experience and inefficient use of resources, the client decided to look for a partner that could guide them to make smarter business decisions.

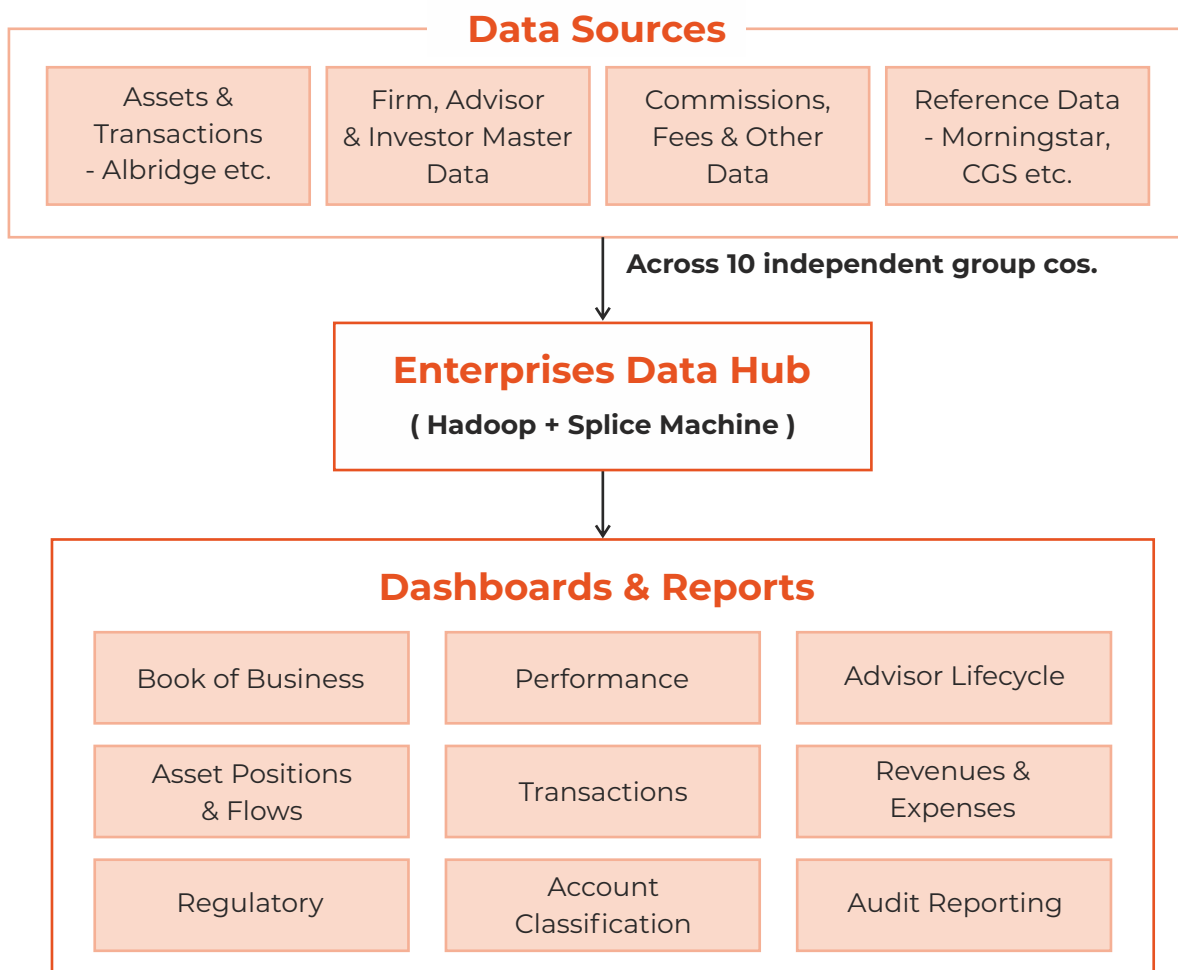
### The Problem

The client had a variety of high volume sensitive data, but the difficulties in data integration and the complex reporting system meant that the whole process became time consuming. A lot of the data were scattered, and reporting was split among multiple visualization tools, including Qlik, Tableau, Pentaho, R. Moreover, the manual excel reporting, along with limited self-service capabilities, included tedious, endless hours of managing data.

## Our Solutions

Incedo designed & developed a unique blend of data warehousing, reporting, visualization, and analytics solution that could help the client overcome data management and reporting obstacles. The solution included significant components such as corporate-wide Enterprise Data Hub and enterprise Reporting and Visualization Factory.

Using big data technology, an enterprise data hub was implemented, with periodic data refresh that enabled the client to combine data from all source systems automatically across the group companies. The enterprise reporting and visualization factory provided the client a critical decision support system presenting an advanced platform (integrated into advisor portal/ home office system portals) for advisors, advisor groups, managers, firm executives, and home users. This enabled self-service/guided search of key metrics and “what-if” scenarios. Also, to enable mobile visualization, we leveraged open source, technologies based accelerator, facilitating better reporting and insights for the advisors



**21** different dashboards and views

## Our Solutions

- 360 degree view of firm for executives
- Flexible access to data and self service at enterprise level
- Rapid turn around of ad hoc report requests from business
- Light & fast dashboards
- 28% increase in dashboard usage
- Reporting self-service leading to reduced ad-hoc requests to BI team
- Reduced cost of ownership with scaling of data
- Reduction in overall Licensing & AMC cost with new licensing model
- Reduced dependency on the system because of reduction in manual reports
- Assisted executive management to make smarter business decisions through comprehensive sets of reporting and insights

## About Incedo

Incedo is a digital transformation expert empowering companies to realize sustainable business impact from their digital investments. Our integrated services and platforms that connect strategy and execution, are built on the foundation of Design, AI, Data, and strong engineering capabilities blended with our deep domain expertise from digital natives.

With over 3,000 professionals in the US, Canada, Latin America, and India and a large, diverse portfolio of long term, Fortune 500 and fast-growing clients worldwide, we work across financial services, telecom, product engineering, and life sciences industries. Visit our website to learn more about how we help clients transform today :[www.incedoinc.com](http://www.incedoinc.com)



### Iselin

170 Wood Avenue South,  
Iselin, New Jersey 08830  
Phone: +1 732 276 1555

### Santa Clara

2880 Lakeside Drive #237,  
Santa Clara, CA, 95054  
Phone: +1 408 531 6040



### Email us

[inquiries@incedoinc.com](mailto:inquiries@incedoinc.com)