netra
TECHNOLOGIES
The Information Management Company

FINANCIAL
SERVICES
COMPANY

**BI SOLUTION IMPROVES
CONFIDENCE IN THE DATA**

No Trust in Error Prone Reporting System
Time Consuming, Manual Corrections Required Frequently

CLIENT

This captive financial services company offers a wide range of financing alternatives and insurance for the parent company's heavy equipment customers and dealers worldwide.

- Financing & Insurance Solutions provides dealers and customers around the world with the products and services they need to protect their new and used equipment. Risk management and insurance expert staff develop and manage programs that support the company's reputation for quality equipment, parts, and service.
- Payment Solutions offers customers a Financial Commercial charge account that they can use to pay for products, parts, service, and rentals at any Dealer or Rental Store in the US.

CHALLENGE

Client executives had little confidence in their error prone internal reporting system and the data that fed it. Executive information requirements were not fully understood, and many manual corrections and other activities were required each month to validate the information and produce acceptable reports. Finally, the reporting system was inflexible, had no sophisticated analytical capabilities, and was not SOX compliant.
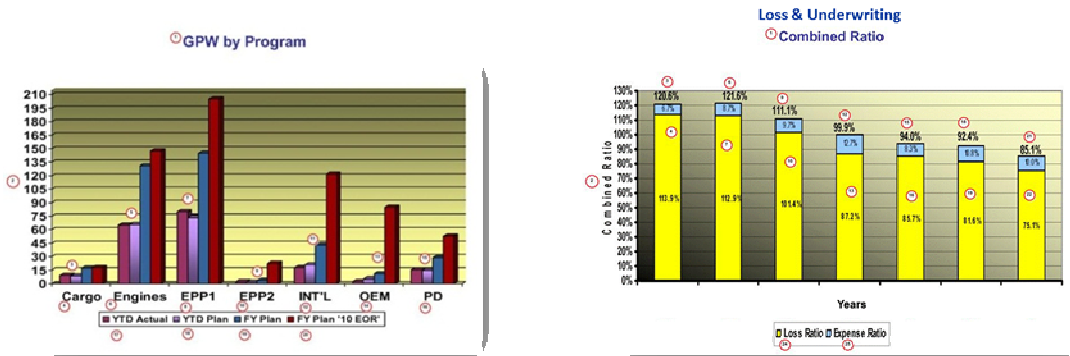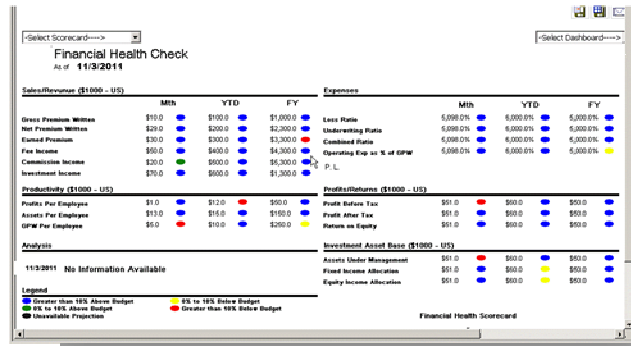
SOLUTION

We guided the client through this critical initiative, from discovery phase and strategy definition to designing and implementing the final BI solution. The Netra team utilized extensive finance and insurance industry expertise to immediately gain visibility into the client's complete requirements in the Discovery phase. We devised the integration strategy which included data profiling at the source, mapping of each source to its target based on requirements, and architecting and developing a high performance, scalable Data Mart integrated with the Data Warehouse.

> *"We now have confidence in the reports we're getting without validating everything multiple times."*
>
> Credit Risk Manager

Then, leveraging existing templates and best practices to accelerate design and implementation, the Netra team delivered a sophisticated business intelligence solution with highly flexible and scalable reporting and analysis of high-integrity data. This was based on an enterprise information management platform and established repeatable processes to manage multi-generational business intelligence (BI) capabilities. The solution eliminated many manual activities for data cleansing, validation, integration, and reporting.

GPW by Program

Loss & Underwriting
Combined Ratio

RESULTS

The established data management standards aligned with business processes, granting enhanced capabilities for reporting and analysis – Dashboards, Scorecards, User Authoring, and Reporting from a "high trust" data repository. Reports from the new system were accepted as SOX compliant.

VALUE PROPOSITION

- BI templates, accelerators, and best practices
- Oracle BI expertise
- Effective Program and Project management capabilities