



Industry: Financial Service Company

Deliverables:

- KPI, Dashboards
- Reports
- Insights

Technology: Power BI, SQL Server 2016, Azure, Amazon Cloud, SQL, CSV Files, Excel Files

Country: South Africa

Project Goal:

The following project goals were discovered:

- The main motive of the project was to build a unique system that could efficiently handle client's financial system.
- Our aim was to automate the entire process of lending money.
- We focused on creating a stellar platform that could manage myriad data and everyday tasks of the client.
- Data Filtration and Modeling for generating accurate report whenever required.

Challenges:

- A major financial services company struggled to provide their employees with insights into both individual and company performance.
- Available data was not organized and was unreliable.
- The absence of a platform for storing centralized data of the customers.
- Lack of the financial analysis system.
- Difficulty in managing various customer accounts simultaneously.
- More manual interventions resulted in unreliable reports.
- Difficulty in getting customer-wise balance information.

“We rendered the client with highly resilient Employee Collaboration & Document Management (ECDM) Solution along with Power BI for integrating myriad data and generating a smart report. Our intelligent solution helped the client experience lightning speed while eliminating manual errors for better productivity and profitability.”



Solution:

- Interest calculation on the basis of daily products.
- Party wise total disbursement.
- Party-wise balances – Daily/monthly/yearly.
- Party-wise total disbursement.
- Customer Profile – Name / Marketer / preferred financial solution/ Balance Details etc.
- Integrated analysis of the lead, sales call, information collection, credit information, approved as well as pre-approved requests, disbursement, DCP etc.
- Reports related to the accumulated number of sales call per marketer, the resolves, as well as the unresolved status of sales, call the customer's interest in a particular product etc.
- Precise & detailed information regarding the date and time of disbursement and DCP.
- Statement of the closure of accounts.
- Efficient document management & tracking of the status across the organization.

Features:

- Dynamic Dashboard: Customer / Marketer Details
- Data Analysis
- TAT Analysis
- Graphical Reports
- Daily / Weekly / Monthly Reports
- Pie Chart Representations
- Finance Management Funnel



Result:

Our intelligent ECDM and Power BI solution helped the client conduct better business analytics. It benefited the client with better management of data, increased transparency and enhanced service delivery improving customer experience. Data Analytics helped the client develop new strategies. The client was able to get a single-holistic view of performance across all the segments.

Our stellar solution helped the client minimize manual entry of critical loan information thus reducing the risk of errors. It further helped the client reduce turnaround and processing times by simply handling the fluctuations. It also simplifies various operations due to a higher level of automation. Moreover, extensive and in-depth reporting resulted into better-decision making process. The client was able to gain useful information on the basis of smart reports.

We have partnered with world-class companies to offer the best solutions available in the market. We minutely understood the client’s requirement and then provided our solution which enabled them to improve their daily operations and implement strategies to meet their goals effectively.



+91 792 657 9333

info@kcsitglobal.com

www.kcsitglobal.com

Global Offices

INDIA

USA

UK

SOUTH AFRICA