



## HMB PROVIDES A CLEAR PATH FOR IMPLEMENTING A BI SOLUTION

### The Challenge:

Our customer's critical business data was dispersed across several systems, governed by many different people and recorded in different formats.

Often, custom-made Excel reports would depict conflicting information and this created confusion in the organization. Our customer needed a way to improve the quality of their data, dramatically reduce the time and effort to generate key reports and create reports that presented accurate data to the right users in the right way.

But with all this data in complex systems, where should they start?

### The Client

Our customer is a respected fiduciary trust that manages billions of dollars annually for their clients.

### The Approach:

HMB worked with our customer to ensure all key business stakeholders would get what they needed out of their data. The approach looked like this:

- HMB conducted a business intelligence (BI) workshop with the heads of all major business units to:
  - Help stakeholders understand what they wanted to measure, where the data exists today and how they'd like to work with their data in the future
  - Identify inefficient operations in data access (on-boarding of new customers, data sharing, etc)
- HMB worked with our customer's IT team to inventory existing systems, data sets, and current BI tool landscape
- Based on results from the workshop, HMB's BI experts recommended the best BI toolset to meet their reporting and visualization needs

### The Solution:

With a roadmap in hand, HMB designed a proof of concept solution from one of our customer's key systems.

The proof of concept would evaluate the tools and models, as selected in the approach, and ensure delivery of our customer's desired reports, dashboards, and visualizations.