

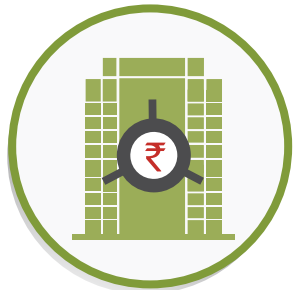


NEED

APPROACH

BENEFIT

IMPACT



CLIENT

Fast growing private sector bank with a pan-India presence and a diverse product and client portfolio

Budgeting and account planning framework for corporate, institutional and mid-market clients

Sales Productivity and Performance Management including 360-degree view of client metrics on a daily basis

Treasury Reporting and Analytics across Forex, Fixed Income, and Money Markets including front and middle office functions

Workflow to create and approve budgets at a customer sub-product level

Comparison with thresholds (cross-sell, return on capital) and prior period actuals

Multi-dimensional roll-ups like branch, city, industry, etc.

Consolidated data mart combining information from ten source systems and multiple Excel file inputs

Self-service, "Slice & Dice" framework enabling multi-dimensional data discovery

Single version of the "truth" across business volumes, spreads and revenues at a product, customer, business segment and industry level.

Analysis of client volumes, limits, profits and transactional behavior. Trader portfolio and strategy level performance analysis. Counter-party analysis by price, exposure, risk diversification. Balance sheet analysis and asset-liability with maturity profiling.

Greater ownership and participation in this bottom-up approach to budgeting

Relationship manager gets a daily 360-degree view of his performance vs. plan at a client, product and portfolio level

Intelligent alerts for better client interaction and decisioning.

Composite client and counter-party analysis for precise sales strategies and better risk management

Objective means to measure sales performance and drive desired productivity and behavioral changes

Improved share-of-wallet and cross-sell metrics

Better client segmentation and improved sales focus

Sales performance management better aligned with business goals

"Since we went live with our first module in 2012, the solution has been adopted across multiple user groups including the wholesale bank, commercial bank, treasury and retail assets group. The implementation involved integrating with multiple source systems - industry standard solutions and homegrown platforms"

ASHISH VORA,
Co-founder and Director, Pragmatix