



# infinata

A Financial Times Group Company

□ **Infinata Inc.**, a wholly owned subsidiary of Pearson PLC (NYSE: PSO) and the Financial Times Group, is an innovative provider of business intelligence and marketing analytics solutions to the global financial services and life sciences industries. Our products and services provide our clients with the ability to leverage information to meet the demanding market environments in which they compete. Infinata combines the innovation and speed of an entrepreneurial organization with the backing of our Global 2000 parent to deliver cost-effective solutions that help our clients grow their business.

□ **Infinata's Enterprise Division** provides custom hosted and in-house data warehousing and analytical services to Fortune 500 financial services firms with the goal of enabling more timely business analysis, standardization of metrics and faster decision-making through broader access to information. Our solutions are custom-tailored to the individual needs of each client, and range in size from small reporting platforms to multi-terabyte data systems. Our business intelligence solutions specialize in the following:

- *Aggregation of data from multiple sources*
- *Transparency in data* structures and definitions to ensure consistency across the organization
- *Powerful end-user tools* for accessing and manipulating the data (reporting tools, querying tools, ability for an end-user to import/export their own smaller datasets)
- *Scalability* that allows the warehouse to grow over time and accommodate changing business needs
- *Hosted solution* or in-house depending on client requirements
- *Dedicated team* to ensure projects are completed on-time and within budget

**Our Approach:** Infinata's approach involves a rapid prototyping process that produces results fast while building a solution that meets the long-term objectives of the project. We take the time up-front to understand the exact client needs to ensure that a solution is designed that meets the project's objective while factoring in constraints such as budget and timelines. With these factors in mind we are able to tackle the most critical needs first to get results quickly while building the longer-term solution in tandem. The larger the project is, the more important it is to show progress early on and we make it a point to deliver important quick first steps, and then consistently meet our deadlines on time and on budget.

**Our Team:** All of our project teams combine sharp project management and strategic acumen with the experienced DBA, network and business analyst skills necessary to manage the huge technical appetites of our clients. Our teams are 100% dedicated to your project to ensure that you are getting all of the attention required to meet the demands of your organization. Individuals can quickly be added or removed from project teams depending upon deadlines and resource requirements.

**Our Infrastructure:** As a subsidiary of the Financial Times Group, we are supported by their global IT infrastructure, which includes full backup/DR facilities and strict security standards and practices. Business continuity and security are a critical issue for our clients and as a result all processes and solutions are designed with these factors in mind.

## Case Study

# IMPLEMENTATION OF A MULTI-TERABYTE DATA WAREHOUSE FOR A NATIONAL BANK

### The Need:

A large National Bank approached Infinata to help them develop a solution that would:

- Provide more timely access to the vast amount of information available across the bank
- Realize significant time and cost savings through automation of mundane and repetitive tasks
- Improve decision-making through more standardized reporting and definitions.

### The Solution:

Infinata worked with the client to define the exact requirements needed to meet the project's business objectives. The solution resulted in a 15+ terabyte data warehouse that included the ingestion of over 50 data feeds from multiple divisions, standardization of bank definitions, custom algorithms to analyze householding and business enterprising, and a suite of analytical tools for end-users to access the information.

### Details of the project:

#### 15+ Terabyte data warehouse

- Containing all product, account, and transactional history - data ranges from retail to commercial to student loans
- Built to support product management, marketing, and business intelligence departments; also makes select data and reports available to over 1,600 individual branches.

#### Data sourced from multiple systems

- Data feeds sourced from over 50 bank systems
- Data ingested on a daily, weekly or monthly basis as needed; New feeds can be added easily and quickly - scalability and growth is critical

#### User based access

- Intelligent design to make different levels of data accessible to different user groups depending on their needs and levels of expertise
- Data striated into groups based on users' needs (e.g. smaller summary tables designed for quick access and analysis by a wider audience vs. billions of historical rows designed for less frequent access by power users)

#### Powerful Analytical Tools

- Oracle Analytics Suite
  - Hyperion - thick client tool used to query directly against the database
  - Oracle BI - thin client, web-based tool designed for Dashboards and Reporting
  - Apex - tool for building user data-marts, import/export of data
- SQL Plus - thick client tool for power users to directly query in SQL
- Environment is structured to allow for additional tools to be added, for example SAS, Campaign Management software etc.

#### Customized Householding and Enterprising algorithms

- Retail and business householding algorithms developed to understand the entire relationship that the bank has with a customer
- 360 degree view of customer utilizes householding to trend the customer, understand profitability, product mix and opportunities to deepen the bank relationship with the customer

#### Documentation is provided to ensure knowledge remains with client

- Full documentation available online of all definitions, summarization, algorithms, reports used in the data warehouse and reporting platforms.
- Established processes for making changes and additions - a simple and standard process to ensure consistency and buy-in. Helps keep the knowledge within the bank.

#### Fully dedicated team

- Dedicated team including a Project Manager, DBA, Network Admin for synching systems, and business analysts for designing summary data, implementing standard bank-wide definitions, reports, analysis
- Analysts continue to act as an extension of the BI team to provide full support, training, ongoing reporting and analysis

#### Report development

- As part of implementation, a series of reports were designed to automate much of the manual work being performed each week - allows bank employees to be more focused on making decisions instead of building reports
- New reports continually added as needs of the bank grow and change

#### Roll-out and Training

- Team focused on training new users on report development and best practices for accessing data
- Series of training programs developed ranging from high-level overview to in-depth power user training.