



# Global Financial Services Firm

## Assessment, Planning And Customer Deployment of a Multi-Environment Data Warehouse and Business Analytics – a Case Study in Guidance Management

### Objective

The client is a leading financial services organization with focus credit card lending. Executives wanted to attract a new retail base while retaining and improving profitability for its current clients by providing value added services. CBIG was able to design and build key functionality to provide sales, marketing and business teams with timely customer information to make better-informed, innovative decisions.

### Solution

The company has utilized an innovative blend of technologies to provide their internal customers a variety of business intelligence services and to offer external customers a value added market analysis service.

The principal business impact and return of the Business Intelligence environment is the combination and integration of existing applications that make this system a strategically critical application that optimizes the four keys of business: Sales, Marketing, Finance and Operations. All pricing, sales, and marketing decisions of the retail business are made via information directly from this BI environment. Extending the capabilities of the system to their retail customers was paramount to the loyalty programs to reduce the cost of repeated new customer acquisition activities.

For external retailers who use the service, the firm has developed and extranet application that gives retailers the ability to analyze the demographics, geographics and house holding information of shoppers who use the credit facility at their stores. For internal customers, the application addresses the following business needs:

- **Marketing:** Campaign management to acquire, activate and retain customers. Market Basket and Shopper Profile analysis from both Merchant and Card Member perspectives to better target campaigns.
- **Sales:** Sales Force Facilitation (portfolio and commission) and CRM strategy to better serve existing customers and assist the sales force with more focused and effective campaigns.
- **Operations:** Enhanced Customer Service capabilities to improve the overall effectiveness of daily customer requests.
- **Finance:** Revenue, Discount Fee and P&L applications to manage, plan and analyze prospective, current and future customers and products. Market Share Impact Analysis to determine the overall effect that the acquisition or defection of a customer or profile of customers would have on the business.

### Customer Profile

The client is a Chicago based credit card lender. Their client base includes some four million retailers and sixty million cardholders.

### Business Situation

The client needed to create a competitive edge by using advanced analytical capabilities to understand, track, anticipate, and find new insights about their cardholders and make information work more effectively for them. They also needed to provide the same analytical capabilities to retailers through an extranet as a value added market analysis service.

### Technology

Oracle 9i  
Microstrategy  
SAS 6.0  
Ab Initio

### CBIG Corporate Overview

Business intelligence and data warehousing are all we do. CBIG offers a full range of services and software targeted at your Business Intelligence environment. Whether you are implementing a data warehouse, a data mart, or need help realizing value from a project already completed, we can help. At the heart of our practice is TruCourse™, our integrated methodology, and FrogPoint™, our BI program management software.