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# Financial Services and Insurance Company Gains Enterprise View of Its Business

Keane provided an innovative, cost-conscious approach to helping its client aggregate enterprise data and gain a greater view of agent business activity.

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## Abstract

This US-based diversified financial services organization needed an aggregated view of the business its agents were generating. The information regarding their activity existed but resided on disparate systems that didn't communicate with each other. Our client desired on-demand access to data management resources that could build an accurate system of record – and maintain that accuracy – about the business agents were conducting. We established a Center of Excellence (COE) that provided the resources our client needed in cost-effective fashion, which enabled our client to get the insight required to support better business decision-making.

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## Challenge

Over the years, this Fortune 1000 diversified financial services institution developed different systems and applications to service its customers across a wide range of products.

The client realized that in order to grow, it needed to better understand the business its agents were conducting. It also needed to provide better information to customers about its line of products, which included mutual funds, life insurance, and retirement plans.

The problem was the data was spread across multiple systems and there was no way to aggregate or glean insight from that data.

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Keane helped this diversified financial services firm gain a unified picture of the business its agents are conducting — information that is critical to support better business decision-making.

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## Application and Infrastructure Solutions

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Keane Client Story:

**Industry:** Financial Services & Insurance

**Offering:** Business Intelligence | Data Management

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Compounding the problem, each system formatted the same agent's data differently and variations in spelling of names made it difficult to properly identify agents across systems.

The company needed to address these issues but due to budget constraints was not willing to completely rewrite the systems and needed an innovative solution to address the needs of their business.

## Solution

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Keane partnered with the client to develop a data management COE made up of development resources to build an operational data store and a production support team responsible for extracting, managing, sharing, and maintaining enterprise data.

Keane provided the COE as a subscription service, which enabled our client to engage and pay for skills only during project phases requiring that expertise.

The development team established an agent master and unification record and hierarchy, which enabled the client to easily aggregate all agent information regardless of the system or application in which it resided. The team also created an enterprise data staging area that would allow data to be easily accessed by an agent Web portal.

Our support team provided the processes, templates, tools, and skills required to manage operational data, monitor production rollouts, and provide support and administration of the data store.

Working collaboratively with the client, Keane also identified production control points to ensure that changes to ancillary applications did not impact data integrity.

In addition, Keane set up an ETL factory, reporting services, and advanced database administration services to accelerate data extraction and reporting.

## Results

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The client now has a unified data store that enables it to get a total picture of the business agents are conducting — information that is critical to support better business decision-making as the company executes its growth plans. In addition, the financial services company has the tools it needs to cross-sell products that might better meet customer needs.

Moreover, by establishing a data management COE and offering development and production support as a subscription-based service, Keane has given our client the flexibility to use and pay for resources only when needed.

Other benefits include:

- » **Improved efficiencies and quality of information service delivery, leading to lower information delivery costs through:**
  - Standardized methods and repeatable processes for aggregating data
  - An enterprise data store that centralizes the organization's operational data

Our client gained the flexibility to use and pay for development and support resources only when needed through Keane's subscription-based data management COE.

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- A COE that provides integrated data analysis, data extraction, reporting, and database administration
- » **Reduced enterprise costs through:**
  - A consistent data architecture and data integration, which reduces costs associated with system complexity, redundancy, and tool proliferation, as well as software licensing and training costs
- On-demand sourcing of skilled resources while providing economies of scale
- » **Enhanced data and system quality assurance through:**
  - Production support that ensures the quality of the client's business intelligence

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#### About Keane

Keane, an NTT DATA Company, is an IT services firm headquartered in the US with more than 12,500 professionals worldwide. For 45 years, Keane has been an Application Services specialist with distinguished project management credentials. Today, we offer a flagship suite of Application Services, as well as Infrastructure and Business Process Outsourcing solutions delivered through onsite, nearshore, and offshore resources.

Visit [www.keane.com](http://www.keane.com) to learn how our projects, managed services, and outsourcing engagements deliver value for a range of businesses and government agencies.

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#### Application and Infrastructure Solutions

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