www.kms-world.com

Linkedin.com/company/knowledge-
management-solutions

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Txt

KMS client snapshot
Private bank
headquartered in Europe

More then 4,500 Branches in 66 countries across 5 continents and more then 110,000 full time employees.

KMS

CHALLENGES

- Generating custom reports from Raw DATA in the Excel format.
- Forecast process was taking lot of time before QlikView deployed for forecast analysis and simulation
- Security setup at Region, Market, Team, Book Level.

BENEFITS

- Reduced Excel report generation from Raw Data.
- Management gets instant info on Finanicial Analysis on Hong Kong, China and Singapore.

SOLUTION

- Deployed system to users in Hong Kong Singapore Branch and
  - **Financial Analysis** - revenue, expense, AUM, NNA, number of relationships and number of clients, performance analysis at region, market, team and relationships manager level.
  - **Assets Under Management (AUM)** to gauge how much money is being managed.
  - **Net New Assets (NNA)** inflow/outflow and structural effects of the company (NNA growth can also be referred to as Organic Growth).
- Forecast Analysis: linear, judgmental and cyclic forecast.
- Extracting data from Data Warehouse in Excel format and from access database.
- **Implementation took approximately 16 weeks.**