



# FINANCIAL COMPANY CASE STUDY

A Financial Services Company Transforms Data Strategy to Deliver Daily Reporting Drives ROI Exceeding \$250K

## COMPANY OVERVIEW

A private financial services company known for its diverse range of investment strategies and a reputation for discreet and personalized wealth management services. With a history of success, they offer solutions to high-net-worth individuals and institutions seeking to grow and protect their assets through both traditional and alternative investments.

## BACKGROUND

The financial services data strategy revolved around building a small in-house data team equipped with cost-effective tools. The financial services company built an in-house data team, embraced the Data Vault framework, and adopted critical tools like WhereScape, Snowflake, Azure Data Factory, and Power BI.

## CHALLENGES

With internal teams lacking Data Vault knowledge, the company was struggling to effectively manage, and leverage data needed to remain competitive and agile.

Challenges included:

- **Limited Scalability:** Without automation tools, scaling data operations would become cumbersome, hindering the company's growth potential.
- **Data Quality Issues:** Manual processes were resulting in data quality problems, leading to inaccurate reporting and decision-making.
- **Lack of Timely Insights:** Without automation, the company was struggling to deliver timely data insights and reports to support business decisions.
- **Inconsistent Reporting:** Inconsistent data sources and processing can lead to inconsistent and unreliable reporting.
- **Limited Agility:** The company was struggling to adapt to changing business requirements and market conditions quickly.

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## WHY INFOVIA

infoVia was highly recommended by Wherescape, and their experience with Data Vault, as well as their willingness to educate the newly formed data team, made them an ideal choice. A competitive price helped cement the financial services company's decision.

"OUR EXPERIENCE WITH INFOVIA HAS BEEN EXCEPTIONAL, AND OUR TEAM ENJOYED WORKING WITH THEM. THE PARTNERSHIP WITH INFOVIA RESULTED IN SPEED AND TRAINING. WE DELIVERED SEVERAL REPORTS IN A SHORT TIMEFRAME WHILE TRAINING OUR TEAM ON DATA VAULT AND WHERESCAPE, CREATING BUSINESS VALUE."  
VICE PRESIDENT, PRODUCT AND ENGINEERING

## RESULTS

- **Team Transformation:** Working with infoVia enabled the financial services team to implement best practices and put effective guardrails in place, ensuring the team's success in specific areas. infoVia helped foster a data-driven culture within the organization by instilling a mindset of leveraging data to drive decision-making and innovation.
- **Empowered Stakeholders and Actionable Insights:** Stakeholders were empowered with actionable insights including frameworks for reporting, dashboards, and visualization tools which enabled stakeholders to make informed decisions based on accurate and timely data.
- **Increased Efficiency and Productivity:** The data strategy optimized data processes, reduced manual effort, and streamlined data integration and analysis. This led to increased efficiency, improved productivity, and reduced time spent on data-related tasks.
- **Business Value Created:** The company delivered essential reports, including financial self-service reporting, leading to over \$250k in ROI. Modern daily reporting also helped attract third-party management acquisitions.