



CASE STUDY

IMPROVING FINANCIAL DECISION-MAKING CAPABILITY

Optimized Data Analysis Provides the Solution

EXECUTE

THE BUSINESS CHALLENGE

Our client, a leading telecommunications company, **needed to improve productivity, data handling and reporting of its investment activity**. The investment portfolio was managed via a labor-intensive spreadsheet system which required the staff to manually enter all the data. Along with the inherent risk of human error the system also lacked critical reporting capabilities, thus requiring manual manipulation for both standard and ad-hoc reporting.

The executive team decided that a database solution was necessary to improve both productivity and reporting. This was primarily due to the fact that trust activity had become a significant contributor to the financial health of the corporation. AGSI's Application Development consultants were selected to design an updated system.

AGSI'S HIGH-LEVERAGE SOLUTION

AGSI analyzed the company's current state processes and designed a solution to automate their investment management processes and provide necessary reporting capabilities.

The key to the design of the new system was **a unique automated client/server system for data collection and performance analysis**, which served as a repository of investment portfolio specifications and performance statistics.

Once the client approved AGSI's conceptual design, AGSI converted all of the data from the manual spreadsheet system to the new system. As part of the design, AGSI developed a set of report generation and monitoring tools that completely eliminated the need for manual manipulation of data.

VALUE TO THE ENTERPRISE

The AGSI solution was **a complete turnkey operation**. With the ability to perform more thorough and timely analysis of the investment portfolio, the investment management team increased executive-level awareness of the importance of the portfolio contribution. The results **improved the organization's ability to make financial decisions by optimizing the investment in technology** with a better understanding of true costs and the impact of pending decisions.

IN BRIEF

CLIENT:

Leader in Telecommunications

ENGAGEMENT:

Database Application Development

CHALLENGE:

Replace labor-intensive spreadsheet systems with more productive application to capture financial data

OUTCOME:

New turnkey database application greatly enhances decision-making capability through optimized reporting and monitoring