



## NEED



Budgeting and account planning framework for corporate, institutional and mid-market clients



Sales productivity and Performance Management including 360-degree view of client metrics on a daily basis



Treasury reporting and analytics across Forex, Fixed Income, Money Markets including front and middle office functions

## APPROACH



Workflow to create and approve budgets at a customer sub-product level



Comparison with thresholds (cross-sell, ROC) and prior period actuals



Multi-dimensional roll-ups like branch, city, industry, etc.



Consolidated Data Mart combining information from ten source systems and Excel files.



Self-service, "Slice & Dice" framework enabling multi-dimensional data discovery.



Single version of the "truth" across business volumes, spreads and revenues at multiple levels



Analysis of client volumes, limits, profits and transactional behavior.



Trader portfolio and performance analysis.



Counter-party analysis by price, exposure, risk diversification.



Balance sheet analysis and asset-liability with maturity profiling.

## BENEFIT



Greater ownership and participation in this bottom-up approach to budgeting



Relationship manager gets a daily 360-degree view of his performance vs. plan at a client, product, portfolio level



Intelligent alerts for better client interaction and decisioning.



Composite client and counter-party analysis for precise sales strategies and better risk management



Objective means to measure sales performance and drive desired productivity and behavioral changes

## IMPACT



Improved share-of-wallet and cross-sell metrics



Better client segmentation and improved sales focus



Sales performance management better aligned with business goals



## CLIENT

Fast growing private sector bank with a pan-India presence and a diverse product and client portfolio

"Since we went live with our first module in 2012, the solution has been adopted across multiple user groups including the wholesale bank, commercial bank, treasury and retail assets group. The implementation involved integrating with multiple source systems - industry standard solutions and homegrown platforms"

**ASHISH VORA,**  
Co-founder and Director, Pragmatix