



# DATA CONVERSION



## Reworking an OpEx System to Improve Reporting

### Case Study



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## Challenge

The Financial Institution required that their existing Operational Excellence (OpEx) system be reworked to incorporate a new divisional structure.

Their OpEx system allowed the creation of an index to calculate and monitor operational performance across various aspects or dimensions common to the various business units, for example, Credit Risk, Customer Service and Compliance. These were then measured against an index, however, it was a very manual process and didn't allow tracking like-for-like.

Furthermore, the OpEx system that was previously in place had a structure based on a single ROI Division. The new structure allows multiple divisions to be added to the system, which in turn allows cross-divisional reporting.

In addition, the solution provided by Dataconversion allows for centralised administration & cross-divisional comparative reporting.

## Solution

This involved creating a new OpEx web application for the generation of questionnaires, the collation of results, and reporting on the same. The solution enables each Quality Assurance Manager to log in through a web browser and manages their own departmental information.

The user is presented with dynamic web forms depending on the chosen department or unit. Scores are saved directly to the database from where advanced reports are generated. Reports generated to facilitate the inclusion of graphs and links to more details etc. to facilitate easy drill-down analysis.

The reporting functionality allows for reports to be generated on a number of different levels.

Reports can be filtered by frequency – Monthly / Quarterly / Half-Yearly / Annually – as well as by department or unit. The reports graph historical data to show emerging trends and also allow drill-down into different unit-specific tasks. This enables low scoring tasks to be uncovered. This, in turn, helps identify possible problem areas that may be impacting on overall OpEx performance.

## Results

The system built by Dataconversion helps ensure data quality for The Financial Institution, as validation of user data entry is built into the web forms. In addition, user roles and permissions are built into the application to ensure only authorised personnel are allowed to manage data or run certain reports etc.

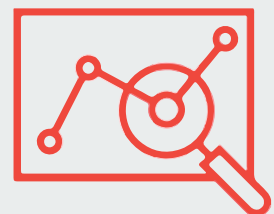
Information can be saved directly to SQL Server which allows for more advanced reporting features. There is now a reduced effort involved in distributing spreadsheets across the business as all scores are entered through dynamically generated web forms. This, in turn, results in an overall improved performance among cross-divisional comparative reporting.



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