CASE STUDY

# A Power BI Success Story for a Leading Credit Solutions Company

## Quick Summary

The successful delivery of eight dashboards for Mortgages Credit for a financial credit solutions company using Power BI, provided a powerful solution for monitoring and optimizing the mortgage credit process.

CRG Solutions was instrumental in addressing the project objectives and implemented solutions that improved decision-making and process efficiency.

## About the Customer

Since 2010, a leading provider of credit solutions has offered customized loan products to customers across various segments, including the self-employed and those with limited formal income documentation. With a customer-centric approach, the credit solutions company understands individual needs and provides access to credit through a range of attractively priced home loan offerings, including balance transfer options and top-up facilities. In order to optimize processes, it was important to monitor reporting and dashboards using an analytics tool.

## Problem Statement:

The project's primary objectives were to implement self-service analytics using Power BI at the organizational level, educate and train users and employees on Power BI reports and dashboards, and develop specific dashboards for Mortgage Credit. The dashboards' targeted areas included stage-wise TAT (turnaround time), TAT trends, counts, and values, PDD (pending document) count, OTC count, SUD (sanctions undisbursed), WIP (work in progress), and a scorecard.
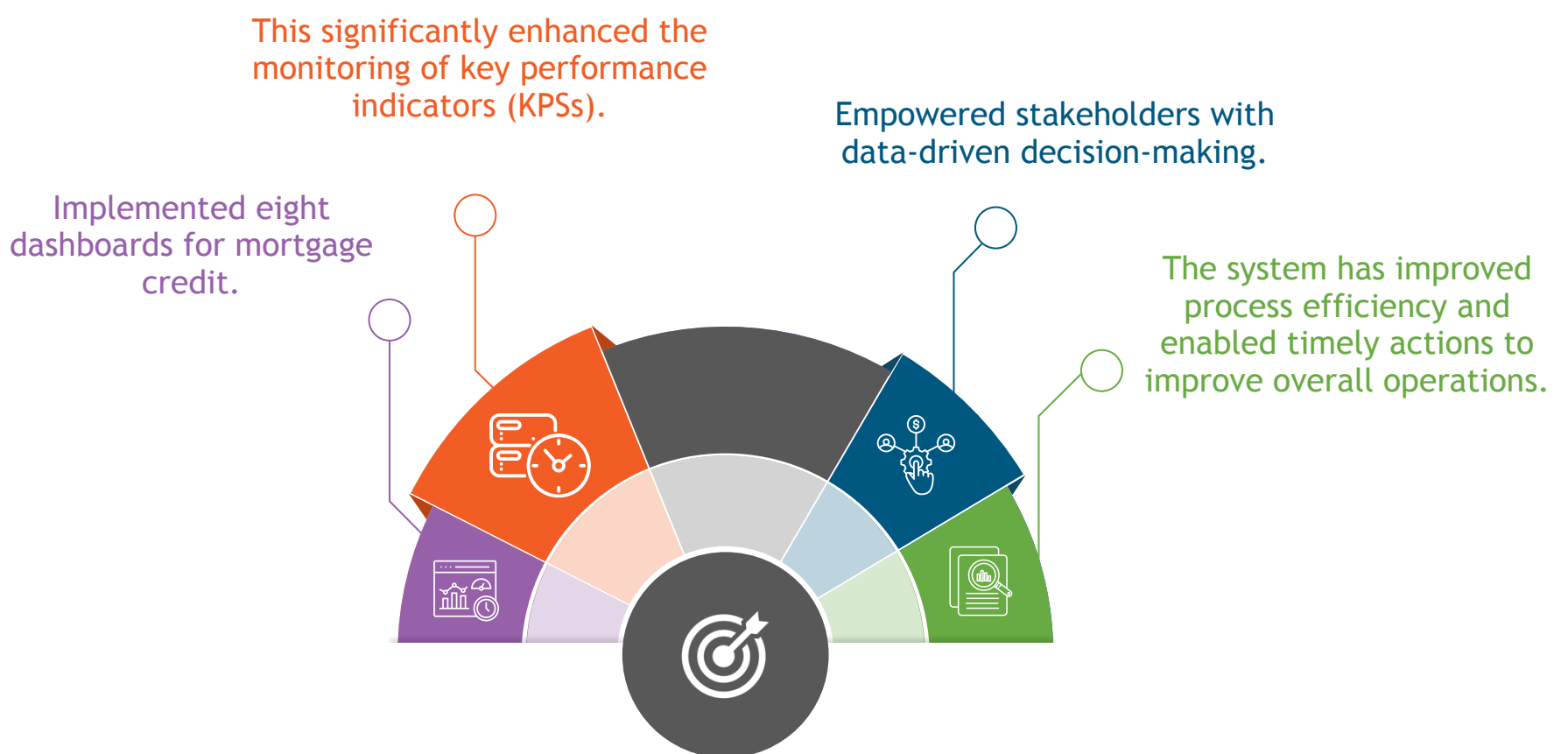
## Solution:

For mortgage credit, CRG Solutions successfully implemented eight dashboards. The Power BI experts not only delivered the dashboards according to customer requirements, but they also created wireframes and a data modeling architecture to adapt and address changing needs based on customer feedback. The implemented dashboards and key KPIs provided valuable insights into the mortgage credit process.

The company's implementation of eight dashboards for Mortgages Credit significantly improved monitoring of key performance indicators (KPIs) and empowered stakeholders with data-driven decision-making capabilities. The dashboards have improved process efficiency and facilitated timely actions to improve overall operations.

## Business Benefits:

This significantly enhanced the monitoring of key performance indicators (KPSs).

Empowered stakeholders with data-driven decision-making.

Implemented eight dashboards for mortgage credit.

The system has improved process efficiency and enabled timely actions to improve overall operations.
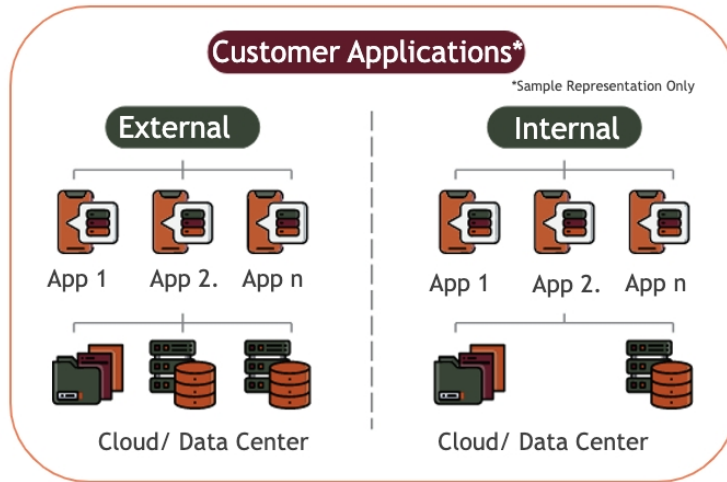
*A Trusted Solution Partner*

*to achieve*

*Business Excellence*

CRG
SOLUTIONS
Analytics . DevOps . RPA

# We Cover

## Analytics

We setup practices, tools to derive insights (customers, products, apps, teams) to enhance or optimize business effectiveness with the help of products like Tableau, Alteryx, PowerBI, Cloud and MLOPs

+ableau  alteryx
Microsoft  USEReady
WE EMPOWER PEOPLE TO SUCCEED WITH DATA

### Customer Applications*
*Sample Representation Only

**External**
App 1   App 2.   App n
Cloud/ Data Center

**Internal**
App 1   App 2.   App n
Cloud/ Data Center

## RPA

We automate all high volume and mundane tasks to reduce manual errors and to increase efficiency with the help of products like AA (Automation Anywhere), Yellow.ai

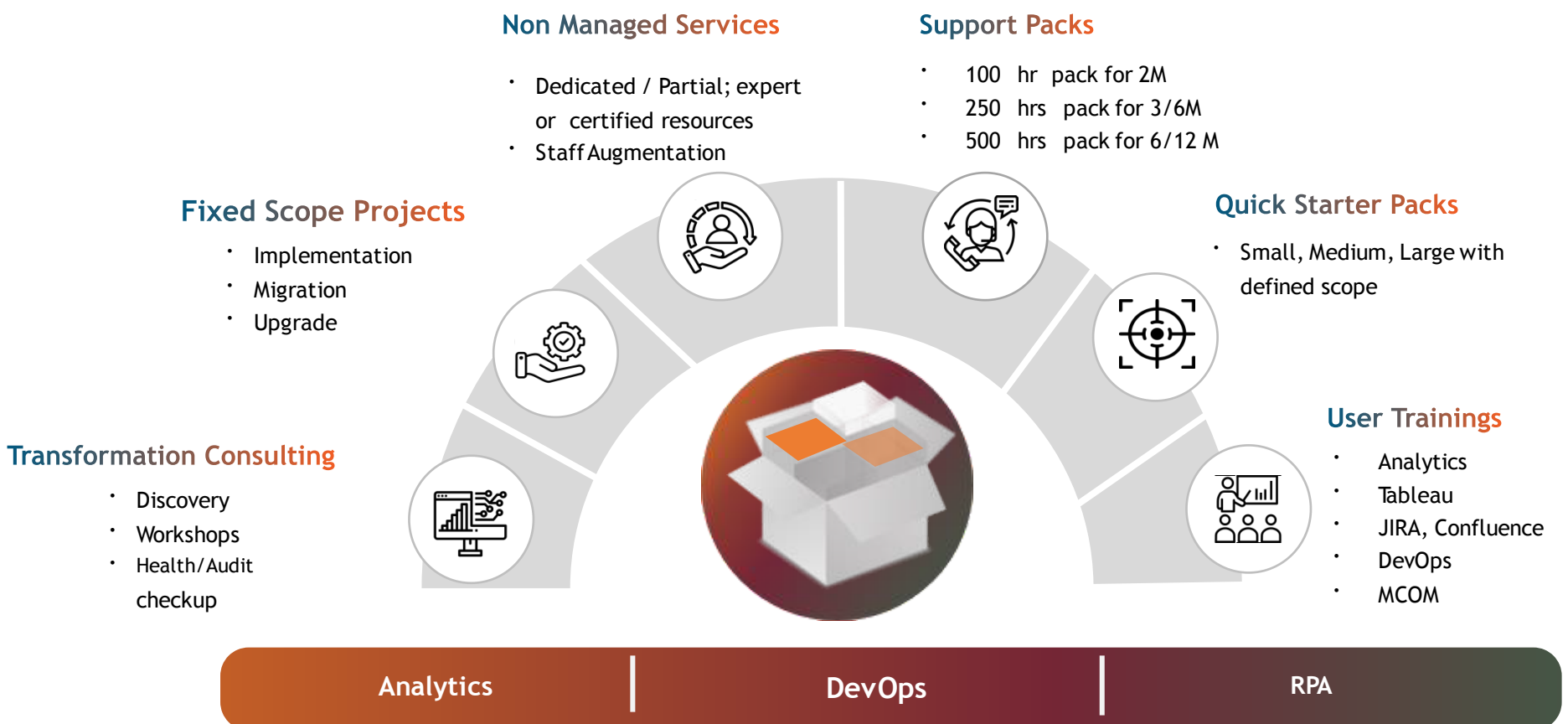AUTOMATION ANYWHERE   yellow.ai

## DevOps

We help streamline the application development and maintenance processes with custom project management practices and implementation of world class software tools like JIRA, Azure DevOps, Azure Cloud to improve team productivity

ATLASSIAN   Microsoft

# Services Portfolio

**Non Managed Services**
- Dedicated / Partial; expert or certified resources
- Staff Augmentation

**Support Packs**
- 100 hr pack for 2M
- 250 hrs pack for 3/6M
- 500 hrs pack for 6/12 M

**Fixed Scope Projects**
- Implementation
- Migration
- Upgrade

**Quick Starter Packs**
- Small, Medium, Large with defined scope

**Transformation Consulting**
- Discovery
- Workshops
- Health/Audit checkup

**User Trainings**
- Analytics
- Tableau
- JIRA, Confluence
- DevOps
- MCOM

| Analytics | DevOps | RPA |
|---|---|---|

# CRG SOLUTIONS
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## Our Socials

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