



CASE STUDY

The Alteryx-Powered Revolution: Transforming Data Capabilities at a Leading Financial Services Company

Quick Summary

CRG Solutions' expertise and Alteryx implementation at the financial services company expedited data processing and provided meaningful insights, improving operational efficiency and decision-making. The comprehensive dashboards and reports ensured transparency and accountability, boosting corporate success. This successful integration marks a milestone in the company's journey towards data-driven decision-making and operational excellence.

About the Customer

The company is a leading provider of financial services in areas such as business loans, working capital finance, equipment finance, and agri-finance, catering to diverse sectors including infrastructure, agriculture, manufacturing, and more. The company recognized the critical importance of data-driven decision-making in staying competitive and addressing the evolving needs of its customers. The company sought to enhance its data processing and reporting capabilities to streamline operations, gain actionable insights, and drive informed decision-making across all levels of the organization.

Problem Statement:

Prior to the implementation of Alteryx, the financial services provider faced challenges in efficiently processing and analyzing data from various sources, leading to delays in decision-making and a lack of comprehensive insight into operations. The absence of a unified platform for data processing and reporting posed a significant hurdle to streamlining operations and providing actionable insights to stakeholders.

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Solution:

CRG Solutions successfully integrated Alteryx solutions into its operations to address the aforementioned challenges. Alteryx has been instrumental in streamlining data processing by enabling efficient DataMart creation from diverse sources, advanced analytics for generating crucial reports, seamless data warehouse integration, and the creation of interactive dashboards using Power BI. This comprehensive solution significantly enhanced the data processing and reporting capabilities of the organization.

CRG Solutions identified the key areas where Alteryx was implemented:

DataMart Creation:

- Alteryx facilitates the creation of DataMart from diverse sources, ensuring a structured workflow and seamless integration of data from Oracle-Finone and SSMS on GCP systems.

Advanced Analytics:

- Engaging Alteryx for advanced analytics, we generate reports for the Business Intelligence Unit (BIU) and a crucial installment vs. DPD report for the credit team.

Data warehouse integration:

- Alteryx seamlessly reads and processes data from the data warehouse, enhancing data quality and reliability before populating the DataMart.

Dashboard Generation:

- Power BI uses DataMart to create interactive dashboards, support internal applications, and provide various views and reports via websites.

Power BI Dashboard Overview:

- Over 100 users access Power BI dashboards, offering data visualization and analysis capabilities for individual performance reviews, comprehensive portfolio assessments, and more.

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Reports and workflows:

- Over 125 scheduled automated workflows and 25+ ad-hoc workflows are currently in operation.
- Key reports were processed such as Portfolio Dump, Disbursal Dump, and Disbursement Status MIS, at varying frequencies to ensure timely and relevant information for decision-makers.

SMARTVIEW Project Dashboard:

- Built on Alteryx, the SMARTVIEW project provides a comprehensive view of key performance indicators, enabling daily performance tracking and supporting Business Monthly Reviews with the CEO.

Alteryx: Advanced Analytics Reports:

- Alteryx plays a pivotal role in generating diverse reports, providing essential insights to the BIU team in various formats such as Excel, PDF, and JPEG.

Business Benefits:

The SMARTVIEW project, enabled by Alteryx, offers a comprehensive view of key performance indicators, supporting daily performance tracking and strategic reviews with the CEO.

Adoption of Alteryx has empowered the Business Intelligence Unit (BIU) team with essential insights in various formats, enhancing their analytical capabilities.

Over 125 scheduled automated workflows, as well as the processing of key reports at varying frequencies, ensure timely and relevant information for decision-makers.

Implementation of Alteryx has enabled data-driven strategies by providing essential insights to the BIU team, contributing to informed decision-making, and enhancing overall operational efficiency.



A Trusted Solution Partner

to achieve

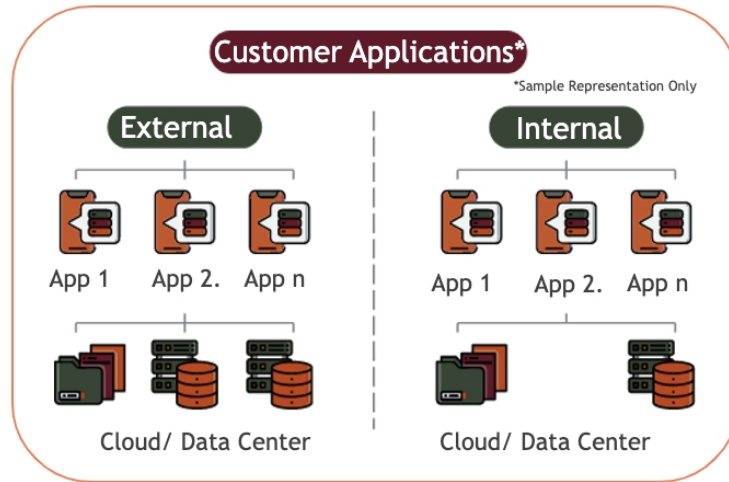
Business Excellence

About CRG solutions

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



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

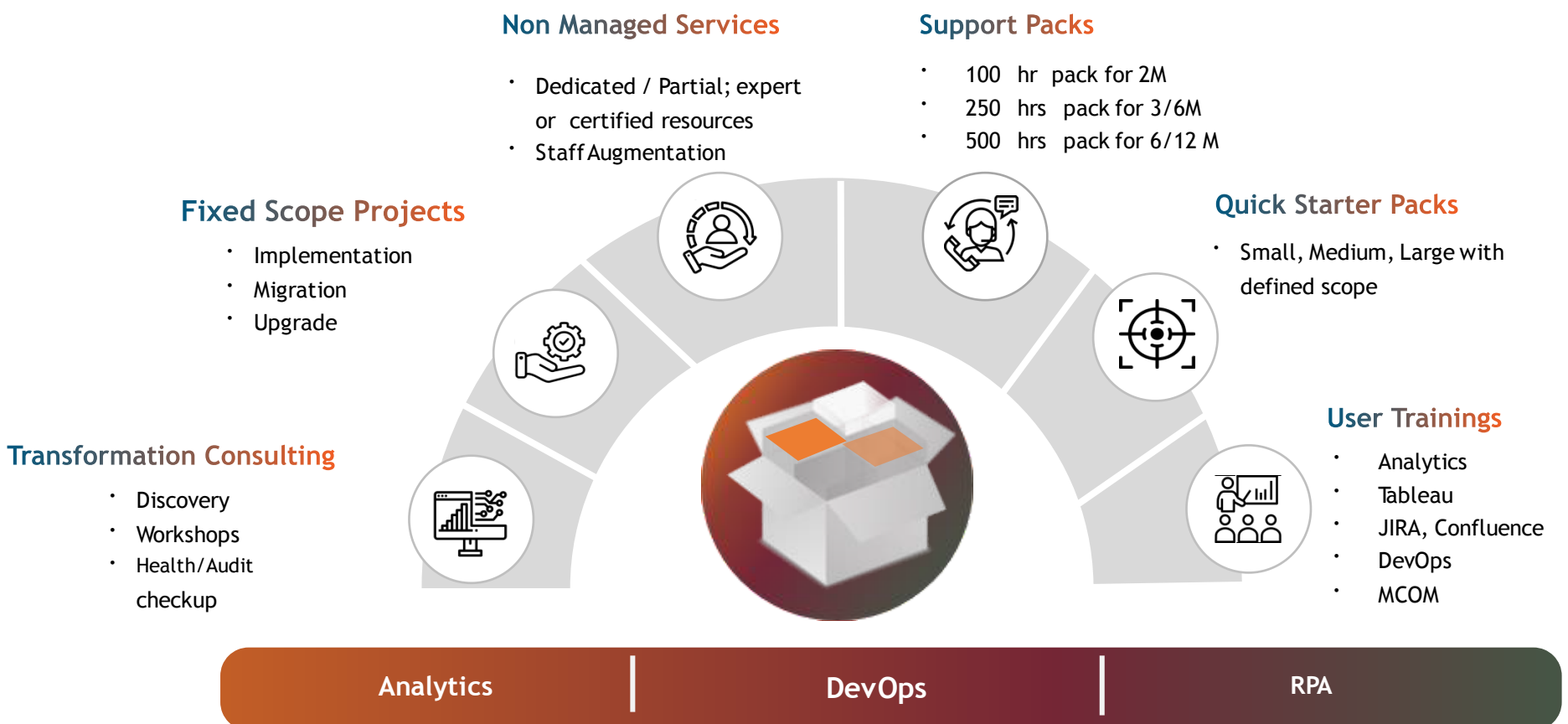


DevOps

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



Services Portfolio



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