



Use Case

#001

Leading Wealth Management for Private Banking

Manage Net New Money objectives, improved business line's strategy

Business users don't want to use complex banking platforms to collect the relevant figures themselves. Solutions for Finance is able to provide a common definition and an intuitive end-user-experience. Cédric Aeberli - Founder & CEO Integraal Solutions



SITUATION

- Existing legacy back-office systems required complex access to the data. Information is there but needs to be treated in order to match with the company's definition and standard.
- Complex and inaccurate data process, lack of efficiency.
- Net New Money objectives are Excel based and some manual extraction are needed to set up a standard report, lack of completeness.
- Static statements (PDF), monthly basis figures, lack of transparency.



OUR SOLUTION

- Digitalization of client Net New Money targeting process.
- Standard definition for the Net New Money, Internal Transfers, Net New Loans and flow of funds at the transaction level.
- Interactive and intuitive ready-to-use dashboards to enable a complete transparency at all level of the organization (business lines, markets, desks, RMs, etc.).
- Daily basis figures and end-user access at any time from any device.
- Enhanced tracking of information (data management) to enable a higher level of compliance.



OUTCOME & BENEFITS

- Time and costs reduction to produce accurate figures.
- Common KPI definition within the whole company: a common language.
- Higher transparency to support the business line's strategy.
- Enhanced forecasting capabilities.
- Increased end-user experience with an intuitive top-down navigation to answer the 'next question'.
- Improved daily work.