



# Data Meaning Automates Strategic Reporting and Analytics for Leading Global Private Equity Investment Firm

# Solution Provides Business Intelligence without Compromise in Performance and Functionality

## Business Challenge

Many companies utilize Business Intelligence (BI) tools to extract and transform data from information and transaction systems across the enterprise into executive reports and dashboards. The BI approach avoids rebuilding systems from scratch and brings together data from disparate silos. However, enterprises regularly encounter major challenges in BI report performance and functionality. Commercially available BI software tools require special expertise to overcome these challenges. The client in this case was a leading global private equity investment firm that provides innovative solutions to institutional clients worldwide. The company initiated a project to speed up, simplify, and advance its reporting and analytic capabilities. The specific project requirements included report automation, fast response times, access to near real-time data and a powerful two-way what-if analytical capability. In order to quickly and efficiently meet these needs the client retained a top tier global consulting company to manage the project.

## Specific Data Meaning Business Intelligence Skills

The project manager introduced Data Meaning to the client, knowing that they had the specialized MicroStrategy and BI expertise necessary to meet the firm's strategic reporting and analytic requirements. Using their BI expertise, Data Meaning executed a successful solution using MicroStrategy software in a matter of weeks. The client has subsequently recommended Data Meaning based on the performance and functionality that they delivered.

The project allowed Data Meaning to apply specific BI skills to the project, including:

- Deep MicroStrategy business object tools expertise
- Core SQL engine understanding
- Informatica extract transform load (ETL) tool knowledge
- Automating complex Intelligent Cube refreshes
- Custom code development using the MicroStrategy software developer kit

## Extracting Data from Multiple Systems into Meaningful Reports

Data Meaning's knowledge of MicroStrategy Business Intelligence (BI) tools allowed them to develop a solution for this leading private equity company that combines data from various operational systems into a centralized data warehouse and out to user report dashboards. Building report architecture correctly to ensure performance and functionality demands core understanding of SQL engine queries that underlies MicroStrategy tool. This expertise is only available from specialist BI consulting companies, such as Data Meaning. Without leveraging such expertise in complex BI projects, performance and functionality are bound to suffer.

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**“Data Meaning quickly delivered a reporting system with the performance and functionality we needed.”**

Paul Shaw, Project Manager Global Consulting Company

## Timely Report Performance

Timely, accurate information is critical to running a private equity business. The company requires their reports to run rapidly when needed. Data Meaning used their expertise with two specific BI tools to deliver rapid report performance for the client. They used Intelligent Cube to extract report data from the central warehouse into memory (cache) to be available on-demand for reporting. Data Meaning used the Informatica extract transform load (ETL) tool to optimize data transformations during the data extraction process. The client also needed to ensure that reports used the latest available data. This means keeping the cached report data in Intelligent Cube refreshed as updates occur, adding further complexity to the project architecture. To meet this challenge, Data Meaning built a notifications layer into Intelligent Cubes to trigger a refresh whenever data warehouse updates occurred. Once notifications are set up, the reporting system is kept up-to-date with the latest information automatically. These performance improvements illustrate how Data Meaning BI expertise overcame complex customer performance requirements.

## Custom Report Building

Data Meaning’s custom development expertise was needed to build a “what-if” reporting capability to automate the client’s hypothetical portfolio analysis. This analysis tests the impact on an investment portfolio that hypothetical changes in ownership percentages cause. To meet this complex requirement, Data Meaning developed an interactive GUI reporting tool that recalculates portfolio values as changes are made to constituent elements. The what-if tool requires two-way interaction with the underlying data warehouse because users introduce new variables at the desktop for transformation. For example, the user may select either the fund currency or the investment currency for their report—requiring access to underlying exchange rate data. MicroStrategy does not provide this two-way capability out-of-the-box, so Data Meaning customized the report functionality using SDK developer tools. The “what-if” report demonstrated Data Meaning’s flexibility and ability to deliver functionality not available in standard BI tools.

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## Around-The-Clock Resources

When the managing consultants needed expert help to complete this project, Data Meaning demonstrated flexibility and dedication to ensure success. In fact, the timetable was so tight that Data Meaning scheduled resources around the clock to complete the work on time.

## The Data Meaning Value Proposition

The project demonstrates how Data Meaning expertise delivered a complex BI solution requiring specialist tools in a timely fashion. The Data Meaning value proposition includes bringing critical resources to bear on building BI systems without compromises in performance and functionality. Data Meaning is able to provide this specialist expertise directly to clients, or as part of a larger implementation team.

To learn more about Data Meaning, please visit [www.datameaning.com](http://www.datameaning.com)