KOTAK MAHINDRA ASSET MANAGEMENT

STREAMLINING THE SALES REPORT GENERATION PROCESS

QUICK FACTS

Industry
Financial services providers

Revenue
US$2.2 billion (parent company)

Employees
300

Headquarters
Mumbai, India

Web Site
www.mutualfund.kotak.com

SAP® Solutions and Services
Reporting using SAP® BusinessObjects™ Web Intelligence® software and SAP BusinessObjects Dashboards software

Implementation Partner
InfoSTEP India Pvt. Ltd.

Kotak Mahindra Asset Management Co. Ltd., India's leading asset management company, wanted to streamline the preparation of sales reports. The firm switched to SAP® BusinessObjects™ Web Intelligence® software for creating these reports and SAP BusinessObjects Dashboards software for displaying them in easy-to-grasp dashboard form. Now reporting is more than twice as quick, enabling faster decisions, and the process is more robust and scalable.

Key Challenges

- Provide sales reports to executives in time for rapid decisions
- Increase scalability, robustness, and flexibility of reporting methodologies
- Contend with high, quickly rising data volumes
- Improve error handling
- Reduce dependence on manual reports

Why SAP Was Selected

- Excellent experiences with SAP® BusinessObjects™ software in the past
- Comprehensive functionality and scalability
- Dashboard drill-down features
- Overall superiority compared with competitive tools

Implementation Best Practices

- Redesigned data model to provide a choice of 11 data "universes" instead of 1
- Automated the extract, transform, and load process and the scheduling of reports
- Used partner's InfoLEADERSHIP methodology and value innovation approach

Low Total Cost of Ownership

- Completed project within budget
- Reduced need for manual intervention to deal with errors
- Automated manual reporting processes
- Allowed IT to meet its deadlines more easily

Financial and Strategic Benefits

- Faster decision making
- Improved awareness of sales performance
- Increased understanding of competitors' threats
- Easier-to-understand results
- Increased reporting flexibility
- More robust and scalable reporting process

Operational Benefits

Key Performance Indicator	Impact
Report generation time	-57%
Number of data universes	From 1 to 11
Number of dashboards	From 0 to 7

"Our new solution has helped accelerate our report generation speed by more than 50%. The solution is more scalable and costs were within our budgetary limits, enabling lower costs and faster ROI."

Ananth Subramanian, Vice President, IT, Kotak Mahindra Asset Management Co. Ltd.

www.sap.com/contactsap

Keeping Sales On Track with Timely Reports

Kotak Mahindra Asset Management Co. Ltd. is the leading asset management company in India's financial services giant Kotak Mahindra Group. A growing player in the country's asset management industry, the firm attributes much of its success to its ability to closely monitor its sales situations and respond quickly. Company executives perform sales tracking via frequent reports that detail their own people's performance and provide overviews of competitors' results and the threats they pose.

The reporting environment that Kotak Mahindra Asset Management used in the past, however, was far from ideal. The process of extracting, transforming, and loading data and creating reports took an average of seven days if all went well, which was often not the case. When errors arose, IT had to restart the process from scratch. The volume of data to be analyzed was growing quickly, taxing the scalability of the process. All reports were generated from a single data "universe" – an inflexible and inefficient approach for special-purpose reports that require access to a small subset of the data. What's more, the reports themselves were not optimized for quick understanding.

Transforming the Report Generation Environment

When the data volume reached 2.5 GB, Kotak Mahindra Asset Management realized it could wait no longer to fix the scalability and other problems with the legacy environment. The firm had had excellent experiences with SAP® BusinessObjects™ solutions on other projects, so it examined the portfolio and found that it addressed all the issues.

With help from its partner InfoSTEP India Pvt. Ltd., Kotak Mahindra Asset Management implemented an environment in which SAP BusinessObjects Web Intelligence® software accesses the data and prepares reports. These reports are presented on dashboards created using SAP BusinessObjects Dashboards software. The team also redesigned the data model to employ a star schema approach with 11 data universes for different departments and subject areas, replacing the single universe approach.

Slashing Turnaround Time by More Than Half

The project was a big success in every way, delivering all the improvements Kotak Mahindra Asset Management had been hoping for. Turnaround time for the entire reporting process now averages three days, an improvement of over 50%. No longer do errors cause the process to hang up and require a restart. Manual involvement in the reporting process has been reduced, saving labor costs.

Company executives not only receive their reports more quickly, but they find the results more understandable because of the insightful dashboard presentations. If users require more detail, they can easily interact with the dashboards by drilling down into the data. All these improvements equip decision makers to respond with greater agility to report revelations – making sales force adjustments or reacting strategically to competitive threats.

Easing the Burden on IT

The new reporting environment is also a boon to IT, which was under considerable pressure to meet difficult deadlines.

As Kotak Mahindra Asset Management continues to grow, so does the volume of data that must be processed and analyzed to create sales reports. But with the scalability and performance improvements of the new reporting infrastructure, the firm no longer is concerned about impacting the timely availability of the information that is so important in maintaining its growth.

Implementation Partner

InfoSTEP India Pvt. Ltd. is a global technology solutions company specializing in business intelligence, enterprise applications, and on-demand services. Its unique value innovation approach helps InfoSTEP provide high-quality solutions at low cost to customers.

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