

SAP Customer Success Story Banking



In a highly competitive, international financial market, managers must quickly assess opportunities and risks across all levels of the bank. To do so, they require ever-faster access to more accurate and consistent information unavailable from traditionally disparate applications.

The **Julius Baer Group** deployed SAP® Business Information Warehouse – a component of SAP Business Intelligence, which is a key offering within SAP NetWeaver™ – to enable global access to such data.

Julius Bär



JULIUS BAER GROUP

SAP® BUSINESS INFORMATION WAREHOUSE FACILITATES QUICK, ACCURATE REPORTING

To achieve the goal of improving the current reporting system, the Julius Baer Group needed a state-of-the-art, integrated business intelligence solution for consistent reporting throughout several business areas and legal entities.

“Based on multiple data sources with partially missing functionality, the cost of operation and risk of failure were too high,” says Dr. Markus Voegelin, head of group controlling with the Julius Baer Group, a financial services institution in Zurich, Switzerland.

The Group, which specializes in worldwide private and institutional asset management services and investment counseling, implemented SAP® Business Information Warehouse (SAP BW) – a component of SAP Business Intelligence, which is a key offering of the SAP NetWeaver™ technology platform – and the Profit Analyzer application commonly used by the banking industry and others.

“The main goal was the implementation of a global MIS [infrastructure] to measure client and product profitability based on single transactions, deliver consistent reporting over all information sources, and integrate data sources from group companies outside Switzerland to provide the same information level as available for Switzerland,” says Mark Bachmann, head of development and projects with group controlling.

THE NEED FOR PRECISE, UNIFORM DATA

The family-owned Group has assets under management of some CHF 114 billion (€74.05 billion) and employs 1,700 persons globally. To remain competitive during turbulent economic times, the institution had to upgrade its expensive and obsolete reporting systems, which no longer delivered adequate analytical and management information.

“There was no consistent processing throughout these information sources. The old solution did not fully cover business requirements anymore,” says Voegelin. The Group needed “up-to-date methodologies, tools, and technology to deliver consistent information for all levels of management.”

The Group chose SAP BW for its ease of integration with existing SAP enterprise business solutions and its ability to extract business content from SAP R/3®. “SAP was already in place in other areas of controlling and accounting,” says Bachmann, “so no additional standard software package needed to be implemented.”

FLEXIBILITY AND INTEGRATION

Seeking a global business intelligence solution, the Group rolled out SAP BW incrementally from April 2002 through June 2003 to some 200 controllers, business managers, executives, and product developers. Voegelin’s team employs InfoCubes, Excel spreadsheets, and flat files to load between 5 million and 8 million records monthly. This adds 50 gigabytes of data per month to SAP BW, which runs on a Sun Fire V880 server. The total size of SAP BW is between 600 gigabytes and 1 terabyte.

Users access the system via the Group’s intranet. From there, they can navigate to different reports and management cockpits. Only a few power users access management, business, and product development analysis reports through Business Explorer Analyzer.

SAP BW holds some 20 cubes of Group data, half of which run on SAP core enterprise systems, the other half on non-SAP systems. With middleware and SAP extraction tools, the bank can incorporate non-SAP information, such as assets under management, net new money, and data sources for staff reporting.

The Group uses the Profit Analyzer application to calculate the funds transfer pricing method in the interest income area. Voegelin’s team sources data from about 20 legacy systems and uses SAP standard extraction tools to incorporate the information into SAP BW. The extraction capabilities let the Group customize business content to business requirements, and the ease of integration between SAP BW and existing SAP enterprise solutions provides a favorable total-cost-of-ownership equation, Bachmann notes.

“We get better and more detailed information for decision-making/strategy-improvement processes and full transparency of client/product profitability.”

Dr. Markus Voegelin, Head of Group Controlling,
Julius Baer Group

QUICK AND SIMPLE ACCESS TO DATA

SAP BW delivers the right information at the right time to Group decision makers. Web-based reporting and analysis capabilities let managers and product developers across the global enterprise obtain fast and easy access to accurate, timely, uniform, and detailed business logic and reporting data about the bank, its products, customers, and employees.

Senior executives employ a management cockpit, available online in the Web reporting area. This capability aggregates the information into key performance indicators, which are visualized in state-of-the-art charts that executives can easily access.

Using a standard Web browser, managers and product developers can run reports and analyses over the Web, which precludes the use of multiple interfaces and reduces manual interactions. Additionally, they can now create and access reports via several selection criteria.

SAP BW's robust reporting capabilities let the Group organize and coordinate data in one central location so managers and product developers can share information with others rather than store it in disconnected databases. "We get better and more detailed information for decision-making/strategy-improvement processes and full transparency of client/product profitability," says Voegelin.

AT A GLANCE

Software:	SAP BW, Profit Analyzer, SAP CO
Hardware platform:	Sun Fire V880 server
Operating system:	Sun Solaris
Database:	Oracle 9.x
Number of users:	200
Number of sites:	20
Length of implementation:	18 to 24 months
Desired change:	Fast, easy access to the right information at the right time
Implementation partners:	bi-solutions ag IBM Global Services

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