

Data to Visualization Journey Transformation for a US Independent Broker Dealer

Key Challenges



- Acquiring an executive-level overview of the business network
- Enhancing mobile features, user experience, and cost efficiency
- Improving services, data integration, reporting, and decision-making through a trusted partner

Business Solution



- > Incedo developed an integrated data solution with an Enterprise Data Hub and Reporting Factory, offering **Data warehousing, reporting, visualization, and analytics** capabilities
- > The solution utilized Big Data technology to automate data integration from various systems and provided a **mobile-accessible reporting and visualization platform** for advisors

Business Impact



Improved decision-making

360* view of the firm

28% increase in dashboard usage

Reduced manual reporting efforts

Decreased ad-hoc requests



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