

GE Money Finds Successful Reporting in the Simplicity of SAS®

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Industry

Financial Services

Business Issue

GE Money needed a solution with presentation layers that would allow static and dynamic reporting with the versatility to appeal to business users as well as more experienced and professional users, who would need to be able to filter and sort data and create graphs.

Solution

SAS® Enterprise BI Server for automated reporting.

Benefits

With SAS, business users access reports through a simple Web interface without help from IT, and users can browse or edit reports according to skill level and need. GE Money estimates a return on its project investment, measured by manpower savings and improvement in business performance and competitive strengths, within 1 1/2 to two years.

GE Money is considered to be one of the biggest financial institutions in the Czech Republic, but more importantly, a real pioneer in the comprehension and implementation of CRM in the local financial market.

GE Money comprises three divisions: GE Money Bank (global bank services, including services for small to medium businesses and retail), GE Money Multiservice (consumer finance services) and GE Money Auto (car purchase financing by lease or consumer loan). GE Money Bank controls 212 branches and 515 ATMs.

Cooperation overview

Because of the institution's previous satisfaction with SAS solutions, especially with data mining and the statistical and analytical products (mainly in the area of cross-sell campaign modeling), GE Money decided to improve its reporting capabilities using SAS.

Customer needs

A business' success directly depends on the availability and timeliness of reporting, and so reporting must clearly inform as to the well-being of every aspect of the business, including which part of the business is successful and which may be stagnant. In the past, reporting in GE Money took an excessively long time, was ineffective and time-consuming.

"At GE Money, we've searched for a solution with presentation layers that would enable not only static but also dynamic reporting," says Jiří Sklenička, Manager of CRM Data Systems at GE

Money. "We needed a solution that would be accepted by business users as well as by more experienced and professional users who could further edit and work with reports. For example, users would need to be able to filter and sort the data, create graphs, etc."

Implementation process

Before using the SAS Enterprise BI Server, reports at GE Money were through ad hoc requests to data warehouses, and presentation was only available as a manual cut and paste into Excel, PowerPoint or in static HTML sites. Analysts were forced to continually submit SQL requests to data warehouses and then manually copy the results. The IT department was responsible for creating reports in the entire bank (approximately 100 reports) on a daily, weekly or monthly basis. The bank was unable to create any dynamic reports, and users could not further edit and work with reports. The delivery process could take as long as two months even though there were four full-time employees devoted to the task. This situation was unacceptable for marketing or general management.

In October 2007, GE Money resolved that it was time to change the reporting situation.

"We were absolutely right!" says Sklenička. "We had been working on a single report for about one month and were facing two ways out: request the report from IT, which meant a long delivery time, or outsource the reporting to an external supplier. The latter raised

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additional budgetary requirements. We were in a vicious circle. We decided to act with help from SAS.”

With SAS, business users can access reports through a simple Web interface without help from IT, and users can browse or edit reports according to skill level or need. The reports show who has worked on campaigns and provide detailed information on individual clients. This information helps the business user work with customers directly and individually without further help or requests to IT.

“The SAS Enterprise BI Server allows GE Money total independence of business from IT,” concludes Sklenička. “Since implementing SAS, the time spent on reporting has decreased significantly. Bringing up the same reports, which took about a month before, does not take us more than a half day, nowadays.”

Benefits

- There is only one version of truth in the company – one common platform for all departments because information is stored in one place.
- Promptness (users don't spend more than a week to craft the most complicated reports).

- The system represents an intelligent superstructure over the IT interface and business, and it clearly shows the line between these two areas.
- Simple, user-friendly environment.
- Transition from static to dynamic reporting.
- Easy export to PDF, Excel or other office applications.
- Easy to count bonuses for salesmen based on these reports.
- Simple configuration and delegation of access rights: Users see only what they should see.
- Short installation time.

Future vision

At present, the system covers around 60 percent of GE Money reports. The institution plans to extend the system to an additional 30-40 users in GE Money Bank's retail division. Possible extension of the reporting system to regional branch offices, which has not yet been decided upon by top management, would result in more than 200 additional users. GE Money estimates the return on its project investment to be measured by manpower savings and improvement in business performance and competitive strengths within 1 1/2 to two years.



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