

Fast, Actionable Financial Insights

Case Study



Client

Leading American RPA software company

Background

Changes in the global business environment have driven an acceleration in traditional corporate time cycles – including in the time necessary to get insights and make decisions based on them. For CFOs and other high-level financial decision-makers, this has made the process of loading and clicking through even modern dashboard-based visualization tools often slow and cumbersome. In response to these changes, a global American software company approached Starschema about developing a solution for personalized, easily accessible and highly actionable financial insights.

Challenges

- Insufficient time to insight and actionability from dashboards
- Need for proprietary UI and functionality

Business Impact

- Improved financial decision-making

Technologies

- SwiftUI
- Python
- MSSQL Server
- Azure Data Factory

Challenge

To enable the fastest possible time to insight and promote faster and better business-critical decisions, the solution had to feature excellent data access speeds when trying to, for example, get a view of travel expenses.

A key challenge was making the displayed insights more actionable than what is possible in a dashboard-based report, which necessitated an intuitive UI that enables and encourages drilling down into the data for actionable insights.

The client specified iOS as the initial target platform for ease of access and targeted the highest standard in look, feel and content delivery.

Solution

This necessitated minimizing the latency between the live and the displayed data, as well as by enabling extensive interactivity with the data shown in the application. The team achieved this by building a customized SwiftUI frontend and loading data sets specified by the client into a data structure optimized for the application using the Azure Data Factory cloud ETL service. The Python backend connects to optimized tables and was prepared for interconnectivity with data science algorithms.

Instead of relying on scaled versions of existing reports for data and UI, the developers identified drill-down routes in the data that would enable getting from high-level KPIs to actionable data – for example, by getting from a KPI to a view of how buyers from a certain region contributed to that KPI, and then to data that would enable contacting the relevant sales representative.

The application was designed to drive engagement through a visually appealing and highly interactive user interface designed to compete with leading KPI monitoring applications, as well as a customizable news function that alerts users to relevant changes in KPI behavior.

Combined with the high level of data accuracy, these features make the application provide more focused context compared with dashboards, which promote more frequent and effective decisions.

Outcome

The client's CFO received the first working version of the application and immediately began using it for everyday work after less than two months of development. Having met their expectations for usability and insight value, the application continues to serve as a foundation for further joint development.

Android and desktop versions of the application are currently in the works to accommodate a wider range of users, and there are planned expansions to the data and feature set, including churn analysis and forecasting.

Go Further

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TALK TO AN EXPERT



Bálint Kocsis

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Balint has several years of experience with data operations in enterprise environments either as a consultant, team lead or delivery manager. He builds high-functioning operations teams from scratch for single technologies or full-scope enterprise data lake architectures.

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COMPANY

At Starschema we believe that data has the power to change the world and data-driven organizations are leading the way. We help organizations use data to make better business decisions, build smarter products, and deliver more value for their customers, employees and investors. We dig into our customers toughest business problems, design solutions and build the technology needed to compete and profit in a data-driven world.

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