

CAPITAL OPTIMISATION

ENTERPRISE LEVEL DASHBOARDING

SOLUTION

- Fully automated dashboarding solution with key functionality allowing for holistic oversight of key balance sheet, risk and capital data

BANKING AREA

- Capital
- Risk
- Enterprise Management (Steerco/Exco)

SKILL SETS

- Microsoft Power BI
- Microsoft SQL
- Database design

THEMES

- Risk Reporting
- Capital Reporting
- Flash Reporting
- Management Information (MI)
- Dashboarding

INSIGHTS

- It is pivotal that the proof of concept is designed with consultation with relevant business areas and consideration for the data architecture and standards of the bank. This will minimise redesign when the solution is implemented.

OVERVIEW

As part of the wider Capital Optimisation programme, the implementation of a dashboard solution allowed for enterprise level management teams to have access to and oversight of key financial and risk metrics at group and business unit levels.

To implement the solution, Monocle worked together with the client to design an efficient data flow and data staging layer for optimal dashboard reporting. This allowed for the seamless automated flow of data from a 'golden source' to the dashboard which was completed, designed and build by Monocle in a Power BI environment.

In delivering this automated solution, manual and legacy reporting become obsolete, saving valuable man hours and reducing the operational risks around manual intervention and reporting. With key balance sheet metrics such as loans and deposits, as well as key risk data including Net RWAs and its constituents, in both an actual and forecasted view – users are easily able to monitor and identify areas of performance and distress.

RESULTS



Completely automated dashboarding solution



Enterprise level data with cluster drill-down functionality



Flash (Forecasted) Reporting for RWAs

TESTIMONIAL

Monocle was able to replicate our design in a very short space of time into Power BI, and then even exceeded our expectation with the dashboard flexibility

Head: Capital Demand Management

KEY SKILLS REQUIRED

- Technical skills with SQL and Power BI
- Knowledge of data flow and database optimisation techniques
- People and interpersonal skills to engage with Exco level clients
- Soft skills including adaptability, stakeholder management, requirements gathering and expectation management