BOARD in B-Source

B-Source: leader in the sourcing of banking services

B-Source is the Swiss market leader in the sourcing of bank back office and IT services to banks in private banking and wealth management.

B-Source also offers ITO services to insurance companies and other financial institutions.

Combined, these clients have over 7'500 employees worldwide, using B-Source systems and services on a 24 hours and 7 days per week basis.

Figures document an impressive daily workload: 3'000'000 technical transactions (the equivalent of 1'000'000 business transactions), managed through 350 Unix servers, 900 Intel servers, 2'500 MIPS mainframe, 4 AS/400 servers, more than 100 TB on storage area network, 2 international wide area networks, 50 local area networks, 3 metropolitan area networks, 1'200 network components, 30 DMZ, 5 neutral zones, 12'000 network access ports, 35 firewalls, 120 routers, 350 switches and more.

The need: overcome the limitations of Excel

"Excel could no longer guarantee our ability to report on and analyze the data obtained from SAP," commented **Luca Mainini**, Head of Finance, "and so we felt the need for a tool that would allow us to interact quickly with this data, in an intelligent manner, and administer the growing volume of information generated by our business."

"At the selection stage," continued **Marco Lusa**, IT Manager, "the principal alternative considered was SAP BW, but the implementation costs and a certain rigidity detected at the prototyping stage suggested that we should go for a more flexible solution. A tool that did not require heavy investment or long lead-times before producing the operational information we needed: this is why we chose BOARD."

"From an IT standpoint," noted **Andrea Bionda**, Internal IT Manager, "this choice assured us of many important advantages: in fact, the adoption of BOARD has enabled us to overcome the limitations of Excel in terms of volume, security, the centralization of data, and the ability to simulate and report. At the same time, we found the tool easy to install and configure, allowing the multidimensional database to be managed in a totally intuitive manner."

The project: reporting, management control and profitability analysis

"Starting with a data structure inherited from SAP and managed in a DWH SQL," explained Luca Mainini, Head of Finance "BOARD is used to generate a multidimensional view of profitability considering three principal dimensions: customer, service and organization (BU). In addition, BOARD has allowed us to add levels of detail not managed by SAP and to reallocate costs and revenues from profit centers to projects, or from divisions to departments, using a series of predefined drivers.

A second project," continued Luca Mainini, "involves the invoicing of back-office services: commencing from a transaction-based system, we use BOARD to monitor and measure a series of quantities, such as the number

board

of calls, the number of payments handled and the number of pages printed, that enable us to price the services provided and invoice the customer accordingly. The panorama of solutions developed using BOARD also includes an application that allows us to consolidate the operating results of all group companies.

The breadth of the information managed using these applications," concluded Luca Mainini, "lays solid foundations for our reporting processes which, thanks to BOARD, benefit from a modern, easy to use and highly interactive interface."

BOARD: simulations, ease of use, latest front-end

"In my view," commented **Marco Lusa**, IT manager, "the value added by BOARD is our new ability to run simulations: we have moved from viewing data "AS-IS" to a more advanced scenario, where we can analyze the impact of likely future events. For example, in our next implementation of the budgeting process, we want to take a dynamic rather than static approach to the available data. Simply by changing certain parameters, we should be able to make projections and forecasts to year end that build on the partial data available for the period," continued **Marco Lusa**. "Clearly, to achieve this, we will need an in-depth knowledge of the tool in order to benefit in full from the opportunities it makes available."

 "In terms of our daily work," explained **Andrea Bionda**, Internal IT Manager, "the upgrade from version 6 to version 7 of BOARD has brought enormous benefits. Administration is now much easier at the installation and configuration stage and, more importantly, when it comes to the various data management activities required: from back-ups to the construction and maintenance of databases, each operation has become easier and more effective."

"From my standpoint, as an advanced end user," concluded **Luca Mainini**, Head of Finance, "the greatest advantage offered by BOARD is undoubtedly its practicality: the front-end has an innovative graphics interface that combines ease of use with a powerful ability to display, analyze and interact with data."

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Marco Lusa
IT manager

Industry
Banking

Application Area
Reporting, costs allocation, profitability analysis, simulation