

# Limits and Exposure Reporting – Power BI Implementation

## 1. The Context

A lack of real time data exposes operational risks.

- Commercial Finance staff at a major financial institution do not have real time access to aggregated lendings and exposure data on commercial clients.
- The compilation of limits and associated exposure across different products, counterparts and geographies was a manual process requiring multiple staff access various systems, engagement with third parties and significant time.
- Existing processes were high in operational risk and resource intensive.

## 2. Our Approach

A collaborative approach with AWS using an AGILE methodology.

- We deployed a dedicated team working collaboratively with the client directly on-site to build and implement a solution on AWS cloud with a Power BI reporting layer using AGILE methodology.
- After initial engagement and identification of key stakeholders, workshops were conducted to determine the customers high level requirements, current state, desired state and pain points to uncover the most appropriate use case to initially roll out.
- The solution includes integration of numerous data sources and Power BI for data visualization and analytics.

## 3. How we Triumphed

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- Removal of manual collation of data with automated gathering of data from source system and improved accuracy.
- Improved efficiencies and time saving associated with day to day activities, regulatory reporting and ad hoc requests.
- Reduction in regulatory and reputational risk through meeting regulatory expectations for adequate risk data capabilities.
- Providing common user interface for global teams.

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