Financial Services Provider Reduces Costs, Enhances Data Delivery and Competitiveness

Overview

Country/Region: Brazil
Industry: Financial Services

Customer Profile

Sao Paulo–based Proservvi Bank of Service Ltd. provides document processing, custom solution development, consulting, and training to banks and other financial services institutions throughout Brazil.

Business Situation

Executives and other users of Proservvi's flagship software solution needed more current, comprehensive, and accurate data to make sound and timely business decisions.

Solution

An upgrade based on Microsoft® Windows Server™ 2003, Microsoft SQL Server™ 2000, and Microsoft Office Professional Edition 2003. It relies on SQL Server DTS Packages and Analysis Server linked cubes.

Benefits

- More timely and complete data
- Greater data integrity
- More cost-effective use of IT
- Enhanced competitive position
- Better preparation for growth

"Providing products and services to help our customers meet the needs of their customers is an excellent way for Proservvi to enhance its competitive position."

Fernando Adriano, IT Director, Proservvi Bank of Service Ltd.

A pioneer of *terceirização*—the outsourcing of business-critical processes—in the Brazilian financial services industry has enhanced its executive decision-making process by delivering more current, comprehensive, and accurate data to users of its flagship solution. By incorporating that solution with a business intelligence system based on the Microsoft® Windows Server™ 2003 operating system, Microsoft SQL Server™ 2000, and Microsoft Office Professional Edition 2003, Proservvi Bank of Service Ltd. is also reducing IT costs. Furthermore, with the updated solution the company is positioning itself for significant growth and greater competitiveness in a highly competitive industry.

Situation

Founded in 1993 and based in Sao Paulo, Proservvi Bank of Service Ltd. provides back-office services to some of the most prestigious banks and other financial institutions in Brazil. Its specialties are the processing of checks and other documents, custom solution development, consulting, and training. By using information technology innovatively, Proservvi has won a 13 percent market share and established operations in 20 locations throughout Brazil.

One key to Proservvi's success is its flagship solution, Cash Image, which automates and tracks the processing of financial documents from the time they are delivered to Proservvi operations centers until they are returned to their originating enterprises. Initially deployed on the Microsoft® Windows NT® 4.0 operating system and upgraded to the Microsoft Windows® 2000 Server operating system, the solution relies on a production database and a datamart database. For years, the solution also had a human component: Proservvi IT staff members who extracted data from the production database and used it to populate the datamart for eventual delivery into Microsoft Excel worksheets for user access.

As Proservvi IT Director Fernando Adriano explains, this approach had a number of limitations. "First, the involvement of IT staff members diverted their attention from other, potentially more lucrative activities and created a 72-hour delay before users could access the data," he says. "Second, users could access no more than two months of historical data because of the hardware demands imposed by large Excel worksheets. Third, maintaining data integrity was difficult, because users shared and updated information from the worksheets without a system in place to ensure version control."

Solution

To address these limitations, Proservvi worked with Microsoft Certified Solution Provider Brasoftware/DBC, also based in Sao Paulo, to upgrade Cash Image by incorporating it with a business intelligence system based on the Microsoft Windows Server™ 2003 operating system, Microsoft SQL Server™ 2000, and Microsoft Office Professional Edition 2003. In the new version of Cash Image, SQL Server DTS Packages extract, transform, and load data from the historical and production database into the datamart. SQL Server Analysis Server online analytical processing (OLAP) cubes deliver information to users through Microsoft Excel PivotTable® dynamic views and HTML pages generated from Excel worksheets with Office Web Components. Windows Authentication secures the cubes, dimensions, and measures by using Analysis Server cube roles.

Benefits

Deploying IT Resources Strategically

Because the new version of Cash Image automates the transfer of data from the SQL Server databases to the Excel PivotTable, IT staff members no longer need to be involved. This dramatically streamlines the overall process, as Brasoftware/DBC Project Director Marcos Casal observes. "Because there is no more programming required, there is no longer the 72-hour wait," he says. "Consequently, users have data that is far more timely for better-informed decision making."

Another advantage of freeing IT staff members from involvement in the Cash Image process is that they can then work on other projects, such as developing new products and services for customers. For example, one customer wanted to know how Proservvi could better support the scanning and hand-entry of its documents into Cash Image, and Proservvi demonstrated just that.

Other customers want more visibility into the process or more detail about the type, volume, and growth of certain transactions so that they can better serve their own customers. "Providing products and services to help our customers meet the needs of their customers is an excellent way for Proservvi to enhance its competitive position," Adriano says.

Better Data for Sounder Decisions

By using an Excel PivotTable to deliver data to users, the new version of Cash Image helps Proservvi to access a greater volume of current data. Cash Image also gives the company the tools to maintain a greater volume of historical data. In addition, by using an Analysis Server linked cube for data exchange and updating—instead of the previously informal worksheet approach—Cash Image can better protect data integrity. Together, these improvements provide the accuracy and detail that users need to make sound management decisions. "Such data can help users to identify problems by more clearly showing process inefficiency, document fraud, or irregular employee activity," Adriano explains. "This will help Proservvi to maintain economy and security for its customers."

Having more accurate and comprehensive data can also help users to better anticipate and allocate human and technology resources by pinpointing regular employee activity and quantifying the use of various computing and information-technology resources. "This capability will help Proservvi better prepare for growth," says Proservvi Development Manager Ricardo Salles.

Scalability Supports Growth

Growth is a popular subject around Proservvi, which witnessed a 20 percent rise in revenues in the first half of 2004. According to Salles, not only do executives intend to maintain that healthy growth rate, they also

plan to double the company workforce by the end of 2004. Consequently, they value the scalability of the Windows operating system. "Today, we are running SQL Server and Analysis Server on the same machine, but we could easily deploy them on separate machines if necessary," he explains. "We could also expand our historical database to six months or even a year of data by adding new server hardware."

Scalability also applies at the human level. "We are confident that any financial professionals we might hire will be familiar with Microsoft Office, and this means they can be using Cash Image effectively with a minimal investment in training," Salles says. "This is a good thing for any company that is preparing for significant growth, especially in our highly competitive industry."

For More Information

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For more information about Brasoftware/DBC products and services, call (55) 11-3179-6700 or visit the Web site at www.brasoftware.com.br/.

For more information about Proservvi Bank of Service Ltd. products and services, call (55) 11-3723-3655 or visit the Web site at www.proservvi.com.br/.

For more information about Windows Server System, go to www.microsoft.com/ windowsserversystem/.

Microsoft Windows Server System

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Software and Services
- Products
  - Microsoft Office 2003 Professional
  - Microsoft SQL Server 2000
  - Microsoft Windows Server 2003 Standard Edition
  - Microsoft Excel 2002

Hardware
- Server: Dell 2650
- Desktop: Dell Optiplex GX 270

Partners
- Brasoftware/DBC

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