

CASE STUDY

MRE Consulting Creates Personalized Business Intelligence Solution for Investment Firm



CHALLENGE

A prominent Houston investment firm enlisted MRE Consulting to help them address the positive problem of outgrowing their current organizational and information sharing system. Traditionally, the firm had prepared and presented its investment decision models in ad-hoc spreadsheets, but was encountering mounting issues with this procedure. The spreadsheets were functional for collecting and storing information, but were not a practical way to present the intelligence they contained to potential investors and decision makers. Simply having so many different types of data stored without a cohesive organizational system made it difficult to link investment decisions to their motivating factors.

SOLUTION

MRE worked to develop and create a specialized and comprehensive business intelligence solution. With the firm's investor information hosted on an easy-access database, MRE was able to remain inside the financial constraints of the project by providing a solution that did not require ongoing manpower to maintain it. Our data modeling and technology infrastructure experts defined and implemented a data warehouse that gives users the ability to adapt and grow the program in accordance with the company's needs.

RESULTS

These collaborative efforts created a streamlined and user-friendly interface to better facilitate data collection, consumption, and presentation. Approved data can now be uploaded by individual users and be immediately available for investment analysis through an intuitive visualization tool — and new ideas are encouraged to grow within the flexible data model.

Clear documentation and communication between both companies resulted in a business intelligence solution that met and anticipated the presented requirements, and allowed the investment firm to better assemble, access, and present information to investors.

BENEFITS:

- More organized and streamlined database
- User-friendly and intuitive information system
- Data gatherers more easily connect with decision makers
- Room to accommodate growth
- More efficient workflow process

