

Banking & Financial Services - Business Insights & Data Analytics for a Leading Bank



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Analytics Solution: SAP & SAS Environment

With a focus on operational excellence, a leading banking institution was looking to strategically leverage its data assets to elevate customer retention and targeted sales using advanced analytics. OTSI developed an extensive reporting and analytics platform, powered by SAS tools, to address challenges in missing / insufficient KPIs due to data gaps and matching of solutions to target customer needs by location improving customer retention and enabling sales solution targeting. The solution ensured data integrity by maintaining completeness, consistency, timeliness, and accuracy of data sources feeding the reporting environment. It seamlessly integrated with databases, validated data, and enabled sophisticated analytics, including comprehensive big data analysis. Supported by SAS Data Management, SAS Visual Analytics, SAS Enterprise Miner, and SAS Enterprise Guide, this initiative equipped the bank with robust data management and advanced analytics capabilities.



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Banking & Financial Services - Cloud Enabled Analytics for a Leading US Bank



Banking & Financial Services - Cloud enabled analytics for a Leading US Bank

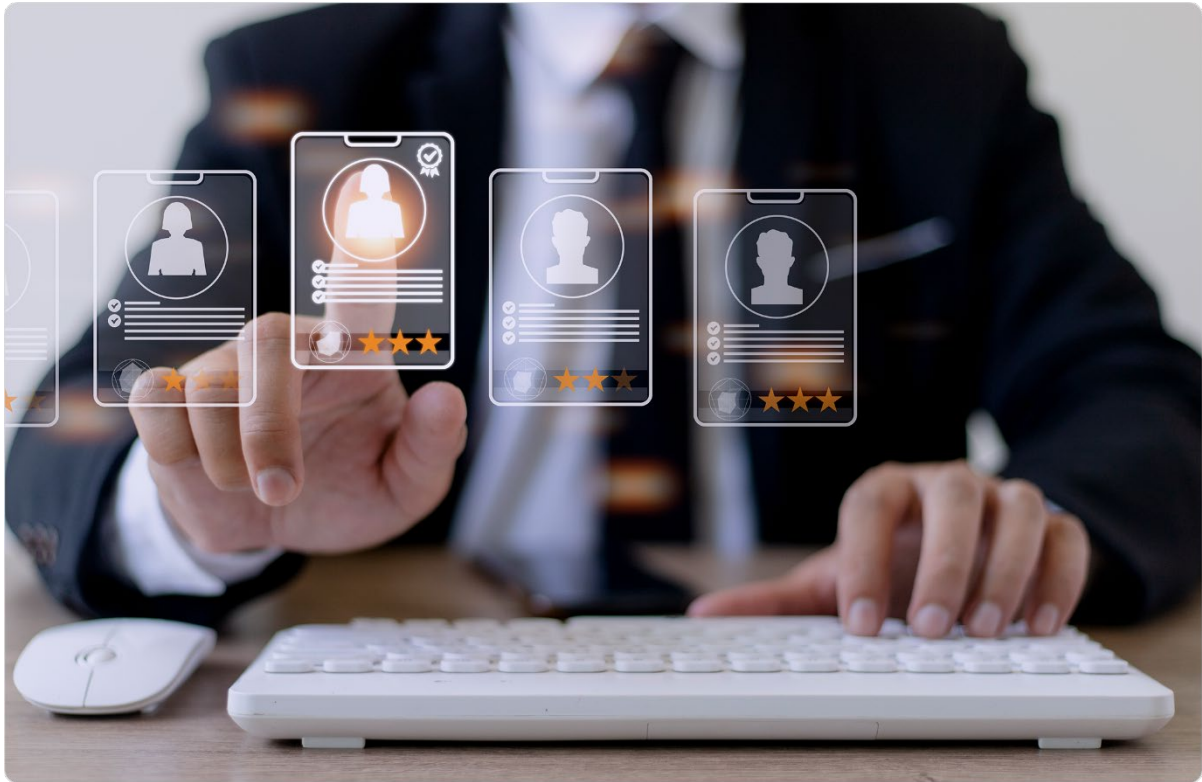
Analytics Solution: AWS, Databricks, DevOps

A comprehensive project is underway in response to a client's need for cost optimization and enhanced loan recovery through heightened automation across their diverse application landscape. Its primary objective is to establish a robust analytics platform serving the entire organization with improved KPIs driven by a centralized repository of enriched data. Key challenges, such as cost and distribution complexities of on-premise infrastructure, limitations hindering business expansion, and partial automation impacting critical activities, are being addressed. The solution entails migrating the analytics infrastructure to the AWS Cloud Platform, employing a suite of AWS tools like Amazon Athena, Amazon S3, DevOps, AWS Lambda, Amazon Glue, Databricks, and Elastic Search. This approach is expected to yield a 7% increase in debt collection, elevate KPIs from 2300 to 4500+, and expand dashboards from 10 to 18, promising significant business enhancements.



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Banking & Financial Services - Switch Basket Uploader (SBU)



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Facing cumbersome manual data entry processes for forms with extensive fields, the client needed a streamlined solution to accelerate data gathering while ensuring accuracy. Their challenges included error-prone data entry, lack of OCR/Form upload support, time-consuming system updates, and a rigid architecture hindering integration. A desktop application was developed to address these issues emphasizing minimal manual intervention and fortified security. The solution consisted of identifying precise business requirements to minimize leaks, implementing an MVVM architectural model with a robust financial framework, and leveraging MS Visual Studio 2019, Windows Presenter Foundation V6.0.2, C# Version 7.3, MySQL 8.0 CE, and a manual QA framework. The estimated benefits included a 94% automation rate for data entry and a 0% data breach, promising enhanced efficiency and security.



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Banking & Financial Services - Business Intelligence for a US Bank



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Analytics Solution: Tableau

The client sought a Decision Support System (DSS) enhancement including the creation of a tailored dashboard catering to their C-suite's strategic needs. They required expertise in reviewing, analysing, and recommending key performance indicators (KPIs) and dashboards. Challenges included under-utilization of existing data assets due to skill gaps, insufficient dashboards impacting decision-making, and a need for enhanced performance evaluation. The solution comprehensively studied the current infrastructure, identified organizational goals, and recommended KPIs aligned with C-suite requirements. This included evaluating existing Tableau dashboards, documenting modifications, and creating new enhanced dashboards. The outcome was significantly improved decision-making through KPIs and dashboards while enhancing overall system and reporting performance.



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Banking & Financial Services - Application Development for a National Mortgage Lender



Banking & Financial Services - Application Development for a National Mortgage Lender

Data & Analytics Solution: Microsoft SQL Server, Tableau, Python

To elevate executive oversight, the client sought to implement dynamic dashboards for comprehensive business performance monitoring. This initiative involved meticulous data validation from various sources to ensure accuracy and the derivation of key performance indicators (KPIs) aligned with strategic business goals. Challenges such as disparate data sources, concerns regarding data quality, and under-utilized reporting capabilities were addressed. The solution encompassed precise KPI identification, the establishment of data marts using Microsoft SQL Server, and the development of advanced dashboards - with a strong emphasis on automation and data quality enhancement. The technical infrastructure included Microsoft SQL Server with SQL & TSQL, Tableau, and Python, offering significant improvements without additional investment.



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Banking & Financial Services - Leading Bank – EDW & MIS-ADF Implementation



Banking & Financial Services - Leading Bank – EDW & MIS-ADF Implementation

Data & Analytics Solution: SAS, JAVA, Oracle

Embarking on a journey to streamline their reporting landscape, the client sought to replace legacy systems with a comprehensive CDR/DW solution. This initiative aimed to automate report generation and submissions while ensuring data accuracy and timely responses. Challenges like manual report preparation and disparate data sources had to be overcome by implementing a Maker-Checker validation option and accommodating both XBRL and non-XBRL formats. The project involved creating unified data sources, implementing a Maker-Checker validation system, and developing web tools for ad-hoc reporting. Leveraging SAS Banking analytics, SAS VA, Java, Oracle, and Java Fullstack, the solution provided improved data flow, enhanced trust, and empowered decision-making.



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Banking & Financial Services - Health Insurance – No Code Test Automation



Banking & Financial Services - Health Insurance – No Code Test Automation

To amplify testing efficiency and reduce technical dependency, the client desired a no-code automation tool for test case creation and execution. The resulting solution, AutoEazy, offered flexibility and scalability with 24/7 regression test support. OTSI's in-house developed user-friendly interface required minimal coding, making it accessible to diverse skill sets. Leveraging Java, JavaScript, and Selenium, AutoEazy ensured cost-effective testing, faster time-to-market, and improved user interfaces. With over 200 reusable components and cross-platform compatibility, it achieved 75% faster releases, 50% automation of manual tests, and seamless scalability.



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Banking & Financial Services - Browser & Mobile Application



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In a strategic digital evolution, a prominent finance company, catering to insurance agents, wanted to fortify its applications for reliability, functionality, and cross-browser compatibility. This transformation aimed to boost efficiency, broaden test coverage, and elevate browser compatibility. Leveraging OTIS's in-house frameworks and tool assessment, and advanced automation framework was engineered using Java, Selenium, Appium, and BrowserStack. This framework enabled script execution across various browsers and mobile devices, seamlessly integrating with BrowserStack for comprehensive compatibility. Collaborative efforts with the development team yielded a substantial ROI through test automation, successfully automating over 110 test cases, achieving an 85% automation rate, and significantly streamlining the testing life cycle and manual execution.



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Banking & Financial Services - Insurance Test Automation



Banking & Financial Services - Insurance Test Automation

As the parent company of an insurance group in the USA, our client oversees five property and casualty insurance firms, specializing in a diverse range of coverage from businesses to farms, homes, and automobiles. They required comprehensive test automation development, framework creation, and support for browser-based applications to bolster their testing capabilities. The project delivered a tool-agnostic hybrid automation framework with a focus on regression testing and a compelling ROI in automation. Leveraging Katalon Studio, JavaScript, Groovy scripting, Jenkins, AS400 Database (IBM tool), and JIRA, the solution optimized testing cycles, reduced manual efforts, and integrated seamlessly with CI/CD and qTest, automating over 900 test cases.



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Banking & Financial Services - Premium Finance & Payments Provider – Salesforce Automation Testing



Banking & Financial Services - Premium Finance & Payments Provider – Salesforce Automation Testing

For a leading premium finance company specializing in insurance solutions, testing their Salesforce application was important to ensure enhanced functionality and broader test coverage. Challenges included reusing existing frameworks, developing new ones for VB applications and web/mobile interfaces, handling dynamic elements and complex layouts, and migrating the Java framework to C#. The project involved evaluating diverse automation tools and frameworks, utilizing a hybrid approach combining open-source and licensed tools, and successfully migrating the framework to C#, leveraging Selenium, Appium, C#, and Coded UI. The outcomes included reduced testing cycles, improved compatibility, heightened ROI, and streamlined manual efforts.



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Banking & Financial Services - Government Health Insurer – Testing COE Establishment



Banking & Financial Services - Government Health Insurer – Testing COE Establishment

As the second-largest national health and dental plan serving federal employees and retirees in the USA, the client aimed to enhance software quality, optimize testing processes, and boost efficiency. The project encompassed a detailed review of existing methods, stakeholder interviews, gap analysis, and the development of a comprehensive improvement roadmap. Leveraging Facets, Macess, Xamrin, SQL Server, and .Net technologies, the solution delivered improved software quality, streamlined processes, optimized resource allocation, better risk management, unified automation frameworks, and 24-hour testing capabilities. Additional benefits included reduced testing cycle times, CI/CD integration, process enhancements, and minimized manual efforts.



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About OTSI

Object Technology Solutions is a leading global technology company offering solutions, consulting, and managed services for businesses worldwide since 1999. We are a forerunner in executing banking & financial services projects and helping our clients realize the potential of technology to solve business challenges. OTSI serves clients from its 15 offices across 6 countries around the globe with a “Follow-the-Sun” model. Object Technology Solutions has strong presence in North America, Central America, and Asia. With headquarters in Overland Park, KS, an 1,800-seat delivery center in Hyderabad, India, and nearshore delivery from San Jose, Costa Rica. These strategic locations offer our customers the competitive advantages of onshore, nearshore, and offshore engagement and delivery options, with 24/7 support. OTSI works with 100+ enterprise customers, of which many are Fortune ranked. OTSI focuses on industry segments such as Banking, Financial Services, Healthcare & Life Sciences, Energy & Utilities, Communications & Media Entertainment, Engineering & Telecom, Retail & Consumer Services, Hi-tech, Manufacturing, Engineering, transport logistics, Government/Public Sector. Our focused technology practices include: Data & Analytics, Digital Transformation, QA & Test Automation, and Enterprise Applications Custom Development & Modernization.



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