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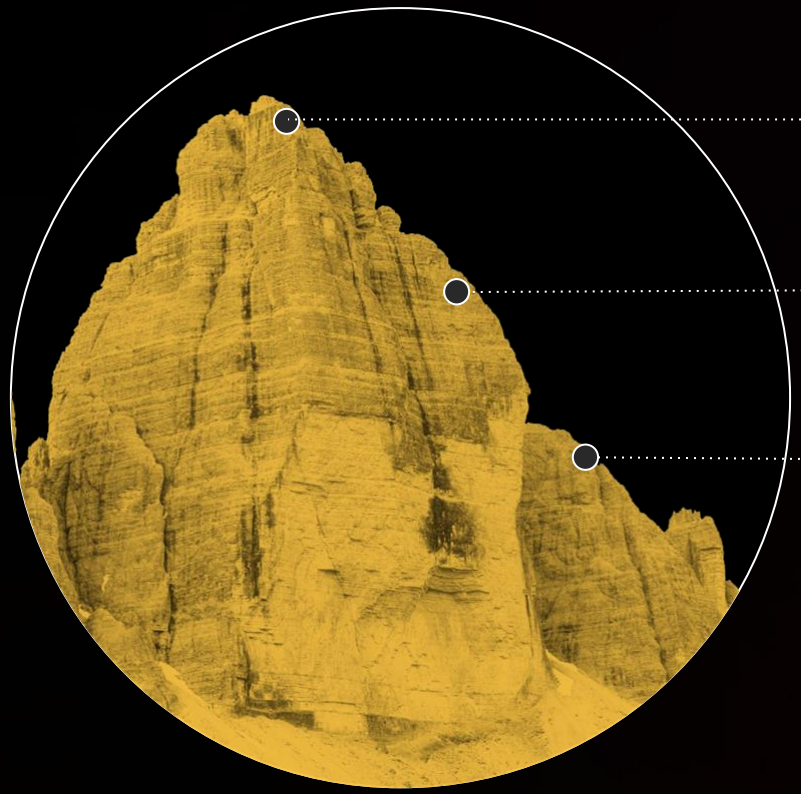
How AI and ML unlock insights for financial services teams

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Dataiku

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The data journey to transforming finance functions



Streamline efficiency

Build the data foundation for finance transformation

- Break data silos
- Ease data access and agility in KPI computing
- Automate reconciliations, financial reports & more
- Improve time-to-market of business analsys

Unify views

Build a unified perspective of business across dimensions – Easily adjust to changes in business structure

- Enhance business partnering through insights
- Provide fine-grained financial analysis built on a unified baseline

Move to prediction

Inject predictive modeling across core processes to maximize P&L management

- Improve forecasting and budget accuracy with AI
- Take on the challenge to answer deeper and more complex business questions

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Why data and analytics are core to financial team transformation journeys

Finance teams are by essence data-driven

- **Financial analysis and data reconciliation: M**onth on month, year on year, across types of costs
- **P&L modeling**
  Assets, liabilities, risks, FX impact, by business lines and products, at initiative level, . . .
- **P2P** process management: Reconciliation and checks, supplier scoring, . . .
- **Budget** building
- **Forecasting**
- **Cash** allocation optimization
- Financial regulatory **reports** production
- Financial **audit** readiness

How agile analytics can enhance finance impact



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Where Dataiku steps in

Stitching data together	Analytics platform	AI factory
Consolidate, clean and enrich data Remove data volume limitations Empower teams in industrializing data processing and analytics development	Develop data-driven decision-making engine Quickly provide ad-hoc analysis Embed outputs across information systems Create foundational financial analytics	Upskill teams toward predictive modeling Embed AI in critical financial decisioning process

In a centralized, governed, audit-ready platform

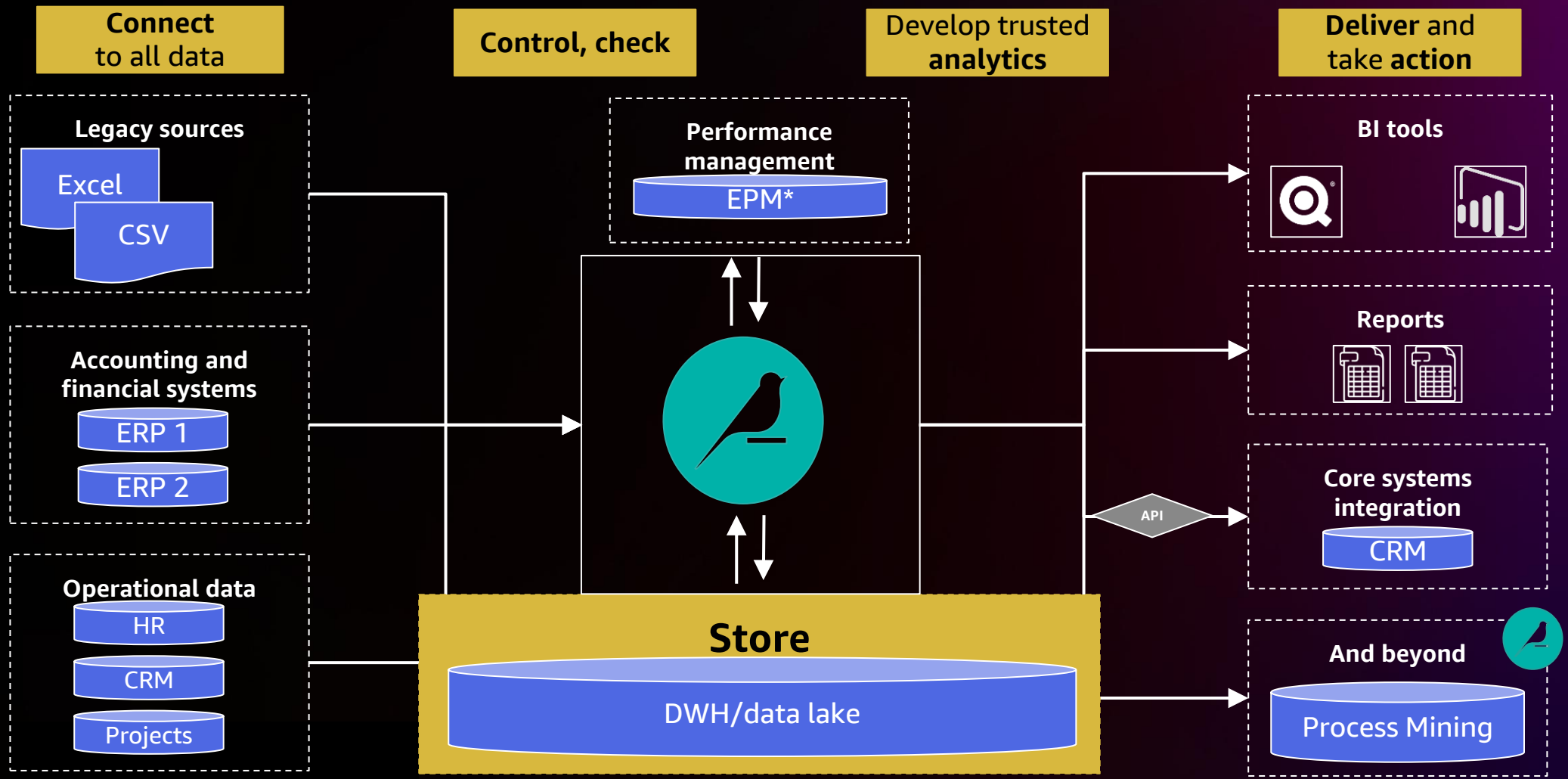


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Federate your data landscape, build an analytics engine for all finance team use cases



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Streamlining financial analytics production and reinforcing forecasting accuracy

FOR STANDARD CHARTERED BANK, COVERING RETAIL, CORPORATE, AND INVESTMENT BANKING ACTIVITIES

CHALLENGE

We wanted to **streamline our financial analysis** and forecasting processes, starting by **automating all financial analytics** production and checks.

While doing so, we wanted to enhance **team ownership and agility** and tap into the potential of **advanced analytics** to improve forecasting accuracy.

/ PROJECT TEAM
Finance & Accounting

/ DOMAIN
P&L Forecasting

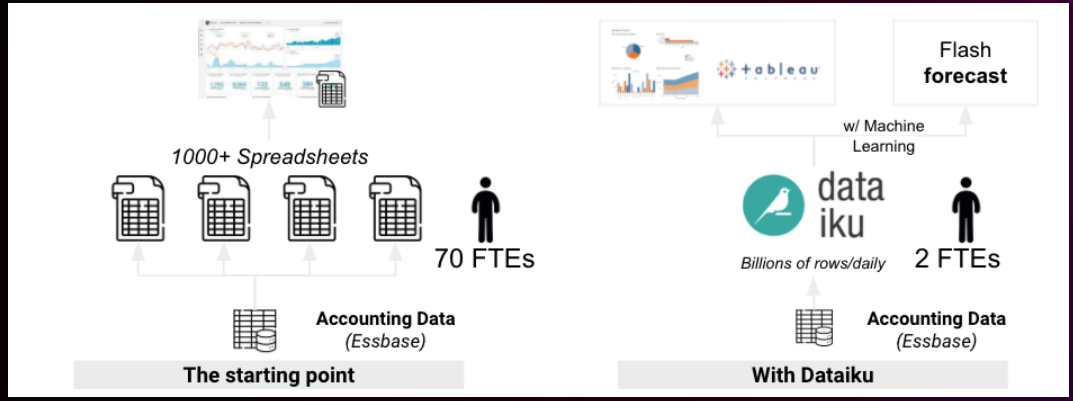
/ TECHNICAL DIMENSION
Data Pipelines and KPIs

COMPLEXITY
LOW — HIGH

BUSINESS IMPACT
LOW — **HIGH**

Banking

HOW TO?



Production of all key financial analytics and process automation
Financial consolidation, forecasting vs. budget, capital amortization automation

VALUE

Reduced operational risks
UC risks mitigation

Improved accuracy and agility
Prototype delivered in 6 months by 2 FTEs

Reinforced governance

Cost reduction

5

FTEs repurposed

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Improving impact of cross-selling by unifying views

CHALLENGE

The marketing team wanted to significantly reinforce impact of our **cross-sells push activities**

For this, we needed to

- **Break silos in our fragmented environment** with multiple teams and legacy systems (due to acquisitions)
- **Ensure collaboration** between the data scientist team and various domain experts to build more relevant projects

/ PROJECT TEAM
Marketing

/ DOMAIN
Recommendation engine

/ TECHNICAL DIMENSION
Machine learning

COMPLEXITY
LOW — HIGH

BUSINESS IMPACT
LOW — HIGH

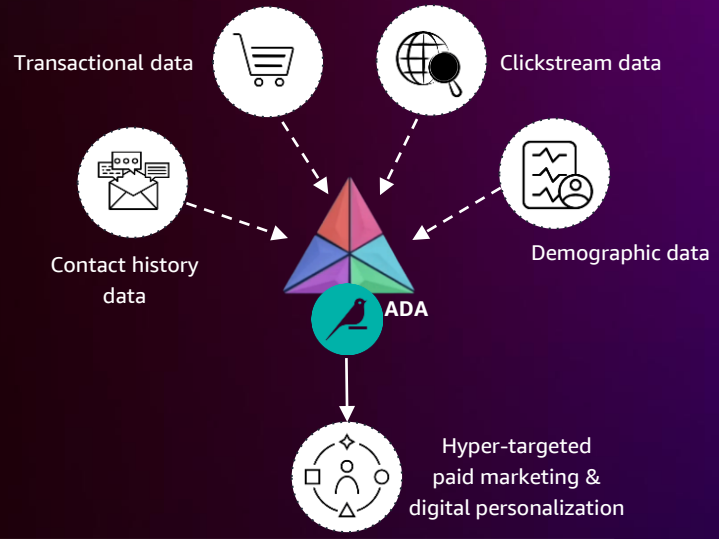
Insurance

HOW TO?

Bridging the gap across multiple systems

Building a **customer-centric** recommendation engine

in a very modular way to **foster reuse**



VALUE

More efficient

5x more efficient in project development with Dataiku models are built and push it to production in **days vs. weeks**

Better marketing

Home marketing: Double-digit increase in customer portal homepage click rate

Customer conversion: Double-digit uplift in click-through and sales rates

Triple-digit

increase in sales across multiple products

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Everyday challenge: Working with Excel

Ensuring data quality



38%

Identify data from multiple sources



36%

Data silos/lack of data sharing within the organization



16%

Providing data security



36%

Identify the most trusted source of data



35%

Cleaning and normalization of the data



10%

Managing data governance and regulatory compliance



36%

Having the capacity to manage the size/frequency



22%

Providing accurate information about the data (metadata)



8%

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*https://econsultsolutions.com/roi-ai/

5 main “umbrella” roadblocks

Enter the big data world





Data preparation





Advanced analytics





Reuse and collaboration





Governance





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Enter the big data world

Leverage existing skills and ensure availability of expertise

Combination of different modes of interaction (visual data prep, full code, auto ML…) and most popular programming languages

Scala python SQL R cloudera

Use your current infrastructure and be ready for tomorrow's

Support an increasingly wide array of storage/processing technologies and facilitate decoupling of data project from selected infrastructure

MAPR docker NVIDIA Hortonworks cloudera snowflake TERADATA VERTICA



Maximize usage of most up-to-date technologies

Full integration of the most popular data and machine learning libraries

Extend based on current and future specific requirements

Connect to a full ecosystem of solutions and customize and manage your own connectors, processors, code, processes, libraries as needed

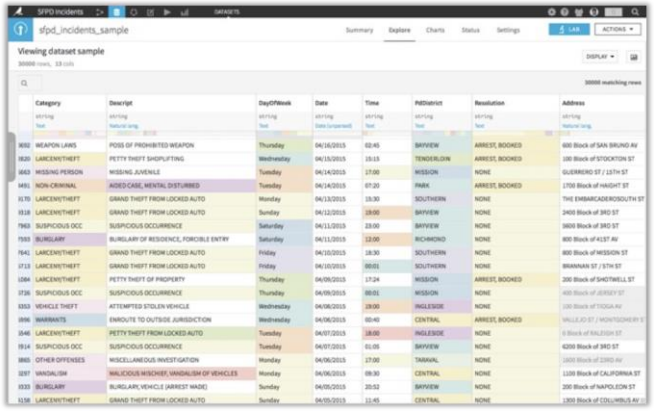
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Data preparation

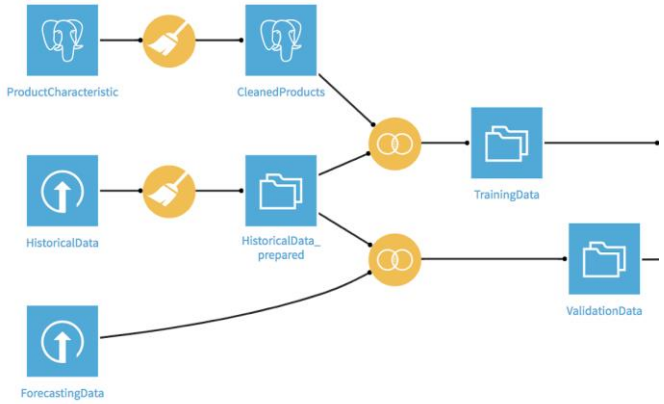
Understand your data

Automatic **Data Quality checks**
Directly navigate
through data samples



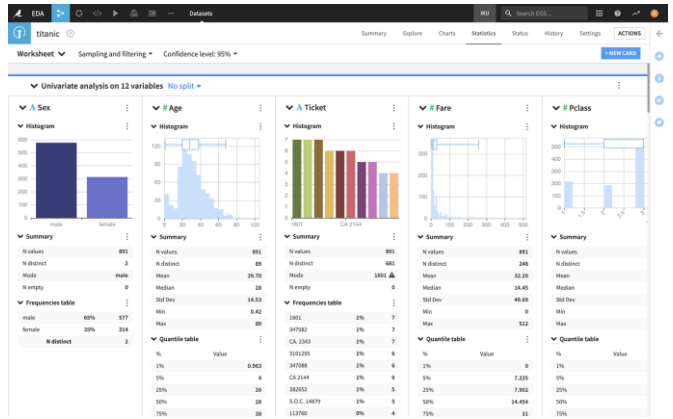
Visual and code-based data manipulation

100+ built-in visual processors to clean, prepare, and enrich data from a point-and-click interface



Data profiling

Descriptive statistics, outlier detection, null values, invalid rows etc.
Interactive statistics (bivariate analyses, statistical tests, correlation matrix …)



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