



# Data *Reset*

Get a Competitive Edge With BNY Mellon's  
Data and Analytics Solutions





# Take Control of *Your Data.*

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**Is your organization unable to utilize the overwhelming amount of data it receives? You're not alone.**

Financial firms around the world are increasingly inundated with information, and need modern solutions to help take control of data sets and synthesize them to make smarter and more informed investment decisions.

This fictional story is centered around a newly appointed Chief Data Officer who is seeking a flexible platform to help her multi-billion dollar financial firm compete in a crowded marketplace. While this story is not based on real accounts, it portrays the journey our clients often experience.

Data creation will grow to an astounding

**175** zettabytes by 2025.  
That's 10X the amount in 2017!<sup>1</sup>

**80%** of enterprises want to increase data operational efficiency.<sup>2</sup>

Source: <sup>1</sup>Data Age 2025: The Digitization of the World, IDC  
<sup>2</sup>Data in 4D, Accenture

# Promotions *and Problems*

## Elizabeth Gardner knows what's wrong.

After working as VP of Analytics Insights at a large asset management company, she recently joined First Hamilton Investments (FHI) as Chief Data Officer. She's all too familiar with the current challenges in the industry and has experienced most of them first-hand.

Though still recognized as a pioneer in the financial industry, growth at FHI has stagnated lately, something its competitors are starting to take advantage of.

Other firms are using a myriad of data to create information advantages that are helping them boost performance and attract investors. While FHI collects large amounts of data, too much of it is difficult to access and under-utilized.

Elizabeth knows to continue to be an industry leader, it all comes down to data. Though it's a daunting task, she is excited to use her knowledge to reset how FHI's data is managed and used. She's eager to be leading the charge with the team and is anxious to see the new opportunities their efforts will bring.

First, though, she needs to understand the root of the firm's challenges so she can figure out how to fix them. This is top-of-mind as Elizabeth enters her first executive team meeting.



## About *First Hamilton Investments\**:

Global financial firm  
widely thought of as an  
**industry leader**

**\$160** billion in assets

**350** employees  
worldwide

\*First Hamilton Investment is a fictional firm. The information portrayed is not based on real accounts.

# The Executive Team Meeting

At the start of the executive team meeting, Chief Operations Officer Clark Fletcher introduces Elizabeth to the rest of the team and then jumps right into business.

FHI hasn't seen growth in new regions in the last year, and Clark is looking to improve investment performance and provide a better, more efficient client experience.

"We need to improve how our data is shared across the enterprise. We need to give our teams better tools to explore and experiment with data," he says. "Greater quality and better levels of automation will help drive revenue and efficiency opportunities."

"Totally agree," says Karla Greenwood, Head of Investment Strategies. "Time and again, I find our team having to clean up and build individual reports. We spend more time gathering the data than analyzing it. Sandeep, when I reached out to you, didn't you mention this all goes back to our aging data architecture?"

"That's right, and I'm glad we're all able to recognize this issue," Sandeep Rupani, Chief Information Officer, says. "My department is overwhelmed. We're struggling to keep up with basic business needs because of our legacy technology. It's also costing us time and money. I will add the solution we implement needs to be able to manage our growing data scaling needs and our large data-sets need to be accessible in minutes. Our current systems just aren't cutting it."



"Is this something your team has the resources to pull off?" Elizabeth asks Sandeep.

"I don't think we should try to tackle this on our own," he says. "My department is already stretched thin, and frankly, our business would get more value out of looking for a quality provider and then working on targeted high value capabilities to support you."

"So, we need a cost-effective solution that can handle our data nuances and complexity, one that makes us more efficient, and gives us the ability to analyze data multi-dimensionally," Elizabeth says.

"And let's not forget our security constraints," says Sandeep.

"It sounds like the two of you should tackle this together," Clark says. "A solution here would have a positive ripple effect throughout the firm, so I would consider this a top priority."

"On it," Elizabeth says.



Analysts, even ones at top firms, spend **40%** of their time gathering data instead of analyzing it.<sup>2</sup>

<sup>2</sup>Source: Stepping up. How finance functions are transforming to drive business results, "PricewaterhouseCoopers (PWC), 2017

# Finding the Right *Fit*

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Elizabeth leaves the meeting feeling overwhelmed at the task before her. Sandeep approaches her to discuss how they will tackle the problem.

“That was a lot to take in, but I’m excited to collaborate on this,” he says.

“Definitely! Like I said, it’s clear to me that we have the data we need, but we have a fragmented view because of our current tools,” she replies. “Any ideas on where we should start looking for a solution?”

“Well, the Chief Data Officer at my previous company utilized BNY Mellon for its data and analytics needs, and the firm was very happy with the end result,” Sandeep says. “That might be something to look at?”

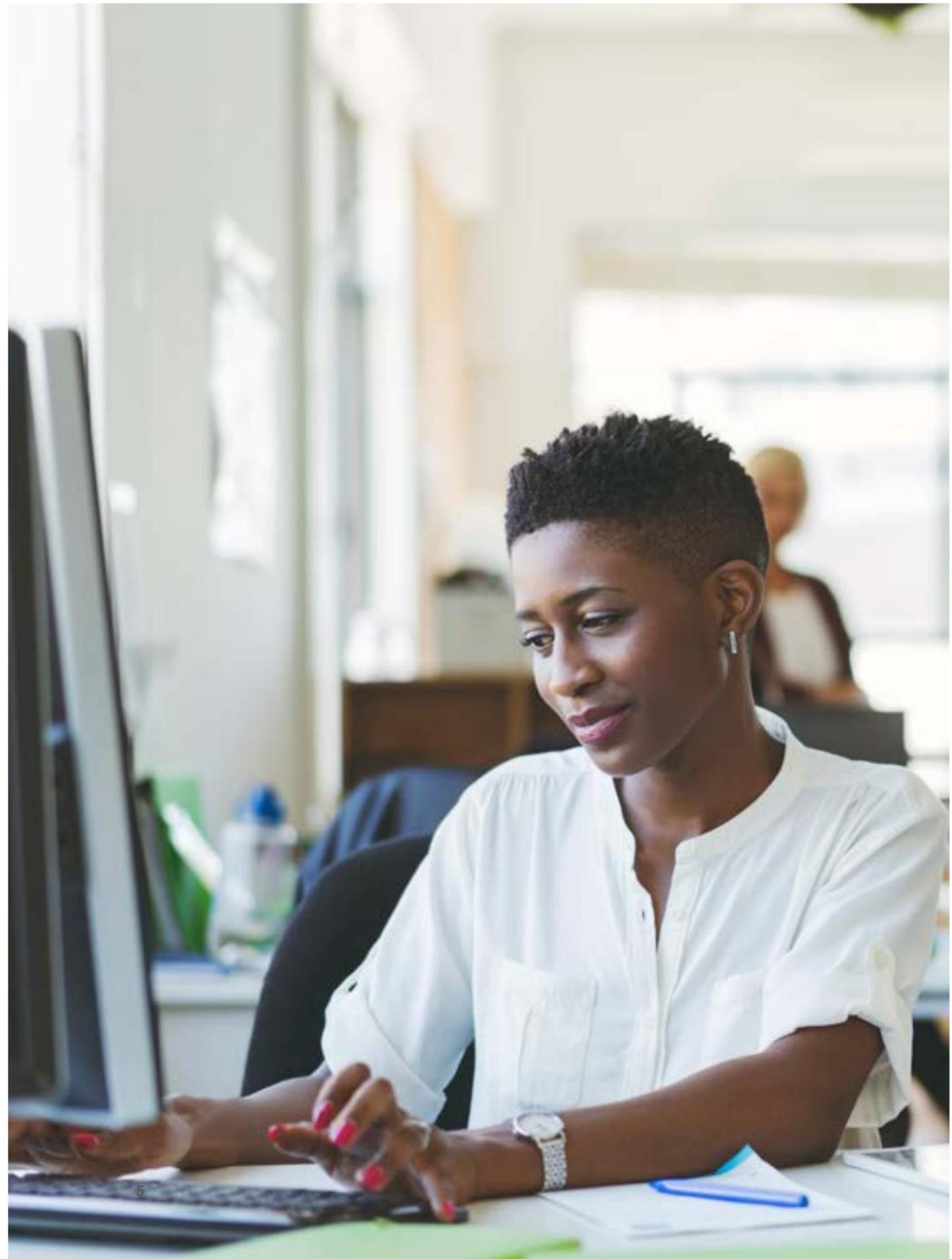
“Sure, I think we should assess our options and see what the best fit for our firm would be,” she says.



**BNY Mellon** is a global leader in providing a comprehensive array of services that enable institutions to service and manage their financial assets.



**BNY Mellon Data and Analytics Solutions**, combines Asset Servicing’s and Eagle product capabilities, with new cloud-based products that help financial institutions grow assets efficiently using its award-winning portfolio management suite.



# Meeting with *BNY Mellon*

After reviewing several options, Elizabeth is confident that the BNY Mellon Data and Analytics Solutions is a great fit for FHI's current and future needs.

Elizabeth and Sandeep reach out to their BNY Mellon account manager to learn more. They quickly set up a meeting with Stuart, a BNY Mellon Relationship Manager. From the beginning, he emphasizes the benefits of their cloud-based tools.

"After learning about the challenges with your current systems, it sounds like you need a solution that provides flexibility without requiring manual intervention, giving you the ability to onboard data faster with automated quality controls. You also need to deliver a consistent set of tools and experiences across the firm, making information readily available at any time using the tools you want to use," Stuart says.

"That's exactly right," says Sandeep.

"Well providing these core capabilities has been our focus and passion for the last 20 years," says Stuart.

"In addition, our tools are built on Microsoft Azure, adding even more benefits for investment firms, such as the ability to scale and boosting power when you need it most. Plus, Azure has over 90 compliance offerings that meet the most stringent requirements."

"Great! I'd love to learn more" Sandeep replies.

"I agree," says Elizabeth.



## With Microsoft Azure & Data + Analytics, *you get:*



An unlimited amount of data that can be brought in.



Data that is always on and always available, no matter where team members access it.



Technical infrastructure that is proactively safeguarded with compliance coverage and unmatched security management.



Protection for your mission-critical workloads and data.

# Mapping the *Journey*

Stuart creates a journey map to show how First Hamilton Investments will be able to take full advantage of the BNY Mellon products and provide more reliable data to the entire firm. He says they will start with the Data Vault.

Emphasizing its speed and resilience, Stuart tells Elizabeth and Sandeep about how their data and analytics solutions will give the firm a secure platform and better, faster access to data they can trust.

“This will ultimately lead to better decision-making when it comes to working with your internal teams and clients,” Stuart says.

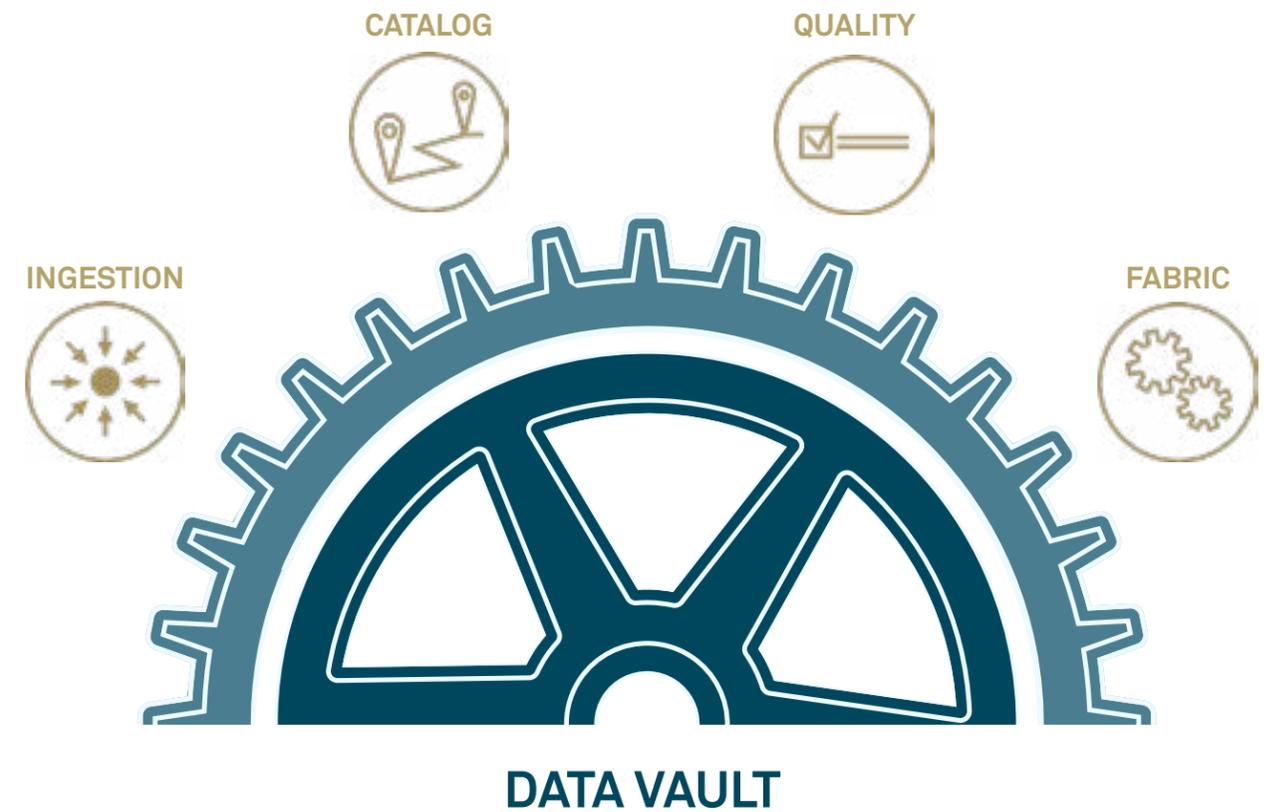
“Karla will be happy to hear that,” Elizabeth says.

“Housing data in the cloud means your team members can access it anywhere, no matter where they’re working,” Stuart tells them. “With Azure and BNY Mellon, you can rest assured your data is always available and proactively safeguarded.”

“It seems like a really streamlined process,” Elizabeth says.

Elizabeth and Sandeep leave the meeting excited to get started with these new tools.

## BNY Mellon’s *Data Vault*



BNY Mellon’s Data Vault is a cloud-based data and analytics platform that seamlessly onboards new data and blends it with existing content to accelerate client innovation and discovery. Users can more quickly and easily interact with data to gain actionable insights while improving auditing and entitlement management.

# Implementing *the Data Vault*

BNY Mellon and FHI work swiftly to begin implementing the solution.

As Sandeep works to get information from the firm's legacy systems, he needs BNY Mellon's expertise to pull data and transition it to the Data Vault.

Peter, a member of Stuart's team who is experienced in this process, is able to work with FHI Technology to onboard the data and evaluate data accuracy and completeness through the Data Vault's machine learning data quality capabilities.

"The Data Vault will make your data available to a broader group of users in a timely way through an intuitive Catalog experience" Peter tells Sandeep. "They'll quickly be able to access the data and we'll continue to add additional sources to complement it."

"I'm impressed with the speed of progress, thank you Peter" Sandeep replies.

Peter and other BNY Mellon data experts work closely with Sandeep's team as they continue to transition data and workloads to the Data Vault.



BNY Mellon has the expertise needed to process and analyze data in the current environment. Implementation strategies are tailored to the clients' unique needs and how data is stored in their legacy platform.

# The BNY Mellon *Data Vault*

FHI sees immediate improvements after implementing the first step of the plan from BNY Mellon Data and Analytics Solutions.

Elizabeth is impressed at just how fast and efficient the process now is to combine data sets, enable what if scenarios, and onboard new data. She's not alone in her enthusiasm, either.

Soon after the Data Vault is implemented, she receives a message from Karla.

"My team is already benefiting in executing our investment strategies from data that is accurate and reliable, timely, and easier to access. I can tell a big barrier to more business has been lifted," Karla writes. "And I'm impressed we didn't have down time during the transition. Great job!"

"I'm so happy to hear that, Karla," Elizabeth replies. "Applying these tools has been smoother than even I could have imagined."

Seeing progress from the start makes Elizabeth even more excited to see the rest of the solution implemented.



**90%** of financial services executives surveyed by Accenture/Oxford Economics say they have a long-term plan for technology innovation.<sup>3</sup>

<sup>3</sup>Source: The Digital Opportunity for Capital Markets Firms, 2019

# The Next *Executive Team Meeting*

When the next executive team meeting rolls around, Elizabeth's colleagues have nothing but good things to say about the solution.

In addition to the immediate effects, Karla's team is feeling more confident in their decision making. With data now easily accessible, analysis is faster and provides better insights. Team members can also create new data sets by combining structured and unstructured data from a wide variety of sources, including financial news, company tweets, and customer service calls, uncovering insights that otherwise would have been missed.

Blending data has had a positive impact across the firm, especially with client engagements. Conversations with clients regarding portfolios are more substantive and exceed expectations. And, the team has already identified new business opportunities.

"I want to reiterate how much of a gamechanger this has been for us," Karla tells the group. "We're able to quickly and efficiently execute on investment strategies and ideas, and we're able to focus on research and identifying opportunities for alpha in the market."

"That's great, Karla," Sandeep says. "We'll be able to easily keep up with any growth because our solution is agile and scalable. Another big improvement."

# Kudos *All Around*



"Elizabeth and Sandeep, blending our disparate data sets together has opened up a new world of possibilities. It's terrific how quickly you were able to find and implement the new solution," Clark says.

"Thank you Clark," Elizabeth says. "Our team at BNY Mellon provided incredible support through the entire process."

"I am glad to have helped," Sandeep adds. "It was an important and necessary endeavor, and I'm impressed at how efficiently we were able to pull it off."

"What else do you have up your sleeve?" Clark jokes.

"Well, the Data Vault is actually just the beginning. In talking with BNY Mellon, we have plans underway to implement the next step of the solution: The Data Studio. It'll give us even more analytical capability when it comes to our data," Elizabeth says.

"Powering our analytical capabilities would boost us even further ahead of the competition," says Patrick, Chief Investment Officer.

"Great, Elizabeth can you connect Patrick with our BNY Mellon team?" Clark says.

**95%** of businesses need to manage unstructured data like global economic factors and other evolving situations.<sup>4</sup>

BNY Mellon's solution seamlessly weaves your structured and unstructured data sets together to help identify emerging investment opportunities.

<sup>4</sup>Source: 'Big Data Goes Big,' Forbes, 2019

## Bringing data together with BNY Mellon



Accelerate onboarding of data across your enterprise to support timely use of new data.



Offload and centralize data consumption to quickly understand the data you possess.



Associate previously disparate data sets to support complex business use cases.



Blend any type of data to gain actionable insights and make more informed decisions.



Augment existing controls with Machine Learning to proactively identify and resolve issues before your consumers realize it.



# BNY Mellon *Data and Analytics Solutions*

**It's simple: Successful firms need to be able to grow with their data.**

Scalability, seamlessly onboarding new data sets, connecting data from multiple sources, and timely access are critical for organizations.

Transforming the way data is managed with a secure cloud solution brings better insights and increased efficiency. The ability to blend different data sets together and interact with it in new ways, gives organizations a newfound confidence in decision making.

BNY Mellon's Data and Analytics Solutions, built on Microsoft Azure, gives leaders like Elizabeth the tools to power their firms into the future.

*Visit our website to learn how to turn your data into actionable insights quicker and more efficiently.*