

## How a FTSE-listed Insurance Broker Moved From Ten Day Manual Close To Daily Automated Reporting

### Challenge

- The finance team were struggling to keep pace with business acquisitions
- Month-end consolidation lived in a long chain of Excel workbooks, lookups, and VBA macros
- High staff turnover due to low morale created by cumbersome, time-consuming manual processes



### Solution

- Designed & delivered a scalable cloud-based Financial Data Warehouse with robust, automated processes
- Created a singular trusted data model
- Provided a single consistent definition of all metrics across every system.
- Automated feeds to drive client-money regulatory controls and bank reconciliation



### Outcome

- Rapid integration of new acquisitions has enabled the business to drive aggressive expansion
- **Monthly close cut from 156 hours effort to 2 hours of automated processing.** The team has been redeployed from manual prep into the analytical and advisory work they were hired for
- Daily data has replaced month-old snapshots, and the warehouse is now the foundation for a new data science capability

