

CASE STUDY

When data is everywhere but insights are nowhere

A leading private bank needed to transform how they leverage data, building governance, enabling self-service analytics, and fostering a culture of data-driven decision making.

3

Year Journey

COO

Collaboration

Self

Service Analytics

THE CLIENT

A Leading Private Bank

Operating in a highly regulated industry where data plays a crucial role in both operational efficiency and customer engagement. They recognised the need for structured data governance and innovative analytics capabilities to stay competitive.

"We needed to empower our teams with data-driven decision making while maintaining the highest ethical standards for data usage."

Chief Operating Officer

INDUSTRY

Private Banking

REGION

United Kingdom

FOCUS

Data Strategy & Governance

THE CHALLENGE

Five barriers to data-driven transformation

No Strategy

Lack of cohesive data strategy aligned with business objectives

Weak Governance

Minimal data governance structure leading to inefficiencies

Limited Visibility

Poor visibility and control over data across IT and business functions

IT Bottlenecks

Dependency on IT teams for analytics, creating delays

Ethics Gap

Need for ethical data usage policies in a regulated industry

THE JOURNEY

How we made it happen

1

Strategise & Govern

- Listened deeply to COO and board to understand data challenges
- Built trust through transparent, honest strategy recommendations
- Prioritised ethical data usage and customer-centric outcomes
- Developed governance framework with clear data ownership roles

2

Discover & Control

- Set clear expectations for governance milestones and outcomes
- Tailored data discovery mechanisms to existing IT processes
- Personalised controls embedded in business change workflows
- Assigned data ownership aligned to team capabilities

3

Enable & Empower

- Resolved analytics bottlenecks with self-service Power BI
- Reduced time-to-insight through targeted upskilling sessions
- Enabled teams to access data independently with minimal effort
- Delivered sustained capability uplift across the organisation

THE TRANSFORMATION

From data chaos to governed insights

BEFORE

Siloed departments, IT bottlenecks, and no unified governance creating inefficiencies

AFTER

Unified governance framework with self-service Power BI analytics empowering all teams

THE FUTURE

Data-driven culture, sustained results

By implementing a structured data strategy and fostering a culture of data-driven innovation, Engaging Data helped the client transform their approach to analytics and governance, creating a sustainable framework that continues to drive operational efficiencies and empower teams with actionable insights.