

CASE STUDY

When your data warehouse can't keep pace, who sets the gold standard?

A distinguished financial advisory firm grappled with performance lag, data silos and scalability strain, transformation was essential.

5

Phase Approach

100%

Data Integrity

Real-Time

Analytics

THE CLIENT

Smith & Williamson

A distinguished financial advisory firm, esteemed for its legacy of trust and proficiency. Offering wealth management, tax advisory, and auditing services to a wide array of discerning clientele.

"Our data warehouse needed to match the calibre of service we provide to our clients, nothing less than excellence."

INDUSTRY Financial Advisory	SCOPE Data Warehouse	INITIATIVE Gold Standard Excellence
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THE CHALLENGE

Critical obstacles impeding operational efficacy

Performance Lag

Slow query response times and latency hindered timely data analysis and proactive decision-making.

Data Complexity

Growing intricacy of data sources led to data silos and hindered comprehensive insights.

Scalability Strain

The Data Warehouse struggled to accommodate escalating volumes, constraining growth prospects.

Operational Inefficiencies

Data fragmentation across departments hindered cross-functional collaboration synergy.

THE JOURNEY

How we made it happen

1

Evaluate & Strategise

- Listened deeply to understand infrastructure pain points
- Conducted meticulous assessments with complete transparency
- Identified performance bottlenecks through honest analysis
- Devised comprehensive strategy with clear architectural blueprint

2

Converge & Empower

- Set clear expectations for integration milestones
- Tailored data fusion approach to their specific ecosystem
- Dismantled silos enabling personalised portfolio insights
- Introduced real-time analytics matched to business needs

3

Fortify & Govern

- Resolved data integrity and security concerns definitively
- Established robust governance with minimal ongoing effort
- Ensured compliance confidence through streamlined processes
- Created scalable architecture supporting future growth

THE TRANSFORMATION

From constraint to gold standard

BEFORE

Fragmented data silos with slow query times, scalability constraints, and departmental isolation limiting cross-functional insights

AFTER

Unified data architecture with real-time analytics, seamless scalability, and cross-departmental collaboration enabling gold standard excellence

Ready for whatever comes next

Through expert data transformation and strategic implementation, Engaging Data successfully established the Gold Standard for Smith & Williamson's Data Warehouse, creating a scalable framework ready for future expansion and innovation.