



Driver Based Planning Solution for a Large Bank in USA

Industry: BFSI

Location: USA

The organization is an American financial services corporation with assets of over \$300Billion. It is the fifth largest bank in the United States by total branches, the sixth largest bank by deposits and sixth largest by total assets.

Business Objective

Automate and integrate Budgeting/Forecasting and Balance Sheet Management with the ability to do detailed LOB level forecasting at a granular level.

Solution Details

- Integrated ALM (Asset Liability Management) & FTP (Funds Transfer Pricing) Solutions with Planning Solution
- Leverage ALM Hierarchies using DRM for Planning Solution at LOB / Segment level
- Enable driver based planning capabilities allowing LOBs to leverage key matrices to plan financials
- Flexible end user reporting and analysis

Benefits

- Reduce risk and improve efficiency by automating manual planning process
- Common repository for budget, forecast and base stress test financials
- Ability to plan multi-year rolling time period and scenarios
- Enable intra-day segment consolidations and easy to use functionality



- Focus on producing future results rather than just measuring past performance
- Provides components necessary for capital adequacy planning
- Improved process efficiency allowing for improved line of business client service

About Rolta

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