

## AN OVERVIEW:

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Clients include: BGL Group, Century Payments, Commonwealth Bank of Australia, Connective, Energy Super, First Data, Government Service Insurance System (GSIS), HBF, Met Traders, Paymark, RecoveriesCorp, SuperIQ, UCPB and UnderwriteMe.

Implementations vary in size, type and complexity.



## The Challenge

Economically testing times and an ultra-competitive global marketplace, combined with the need to adhere to growingly rigorous regulations, mean that organizations within all sections of the finance industry are under increasing pressure to make better, faster decisions.

Financial institutions across the globe – from major banks to insurers – rely on Yellowfin's Business Intelligence (BI) solution to increase employee productivity, improve operational efficiencies and drive customer acquisition, retention and satisfaction.

## The Solution

**Yellowfin helps the financial industry answer its toughest questions quickly and accurately, everyday.**

Decision-makers are able to access the critical information they need – anywhere, anytime, via any device – to take the most effective action possible.

**With Yellowfin, financial organizations can:**

- Analyze and deliver better products, services and value to current and future customers
- Reduce expenditure by better understanding and streamlining operations
- Rapidly identify and act on emerging business opportunities and changing market conditions
- Improve risk management, quality control and regulatory compliance protocols
- Maximize investment returns and margins
- Gain visibility into, and optimize, transaction processing.

## Key Customers

### Century Payments

Based in America, Century Payments partners with ISV, POS Resellers, and Referral Partners to deliver automated electronic payments processing technology. Through white label alliance programs, Century is the fastest growing electronic payments company, having boarded over 50,000 merchants in the last three years, and processing close to \$12 billion in annual volume. In 2012, Century entered into an elite group, recognized on the Inc. 500 list, as one of the top 100 fastest growing privately owned businesses for three consecutive years.

### Commonwealth Bank of Australia

The Commonwealth Bank of Australia (CBA) is one of Australia's 'big four' banks and the most recognized brand in the Australian financial services industry. CBA is a leading provider of integrated financial services, including retail, premium, business and institutional banking, funds management, superannuation, insurance, investment and share-broking products and services. The CBA Group is one of the largest listed companies on the Australian Securities Exchange and is included in the Morgan Stanley Capital Global Index. Other award-winning brands within the Group include its wealth management business Colonial First State, online broking service CommSec and Bankwest. Commonwealth Bank/Colonial First State's retail platform, FirstChoice, has the largest market share of the \$574 billion retail managed funds market according to Plan for Life's March Quarter 2013 report. Over 52,000 people work for the CBA Group.

### Energy Super

With over 49,000 members, and around \$5 billion funds under management, Energy Super is a leading superannuation fund for employees of the Australian energy industry. Energy Super have been awarded SuperRatings Platinum rating for 'Best Value for Money' fund for five years in a row, and Selecting Super's highest possible AAA Quality Assessment rating for both Workplace and Income Stream super.

### Connective

Founded in 2003, Connective is the fastest growing mortgage aggregator in Australia. Over 1,950 leading mortgage brokers rely on Connective's services to achieve their business goals. Featured three years running in the BRW Fast 100, Connective has won the MFAA Wholesale Aggregator of the Year four times, as well as Australian Broking Awards Aggregator of the Year.

Connective has positioned itself as a leader in the mortgage broking industry, enabling mortgage brokers to make "substantially more" profit, via its Mercury software solution. Mercury is a software platform purpose built for the mortgage broking industry, offering brokers complete control and visibility of every aspect of their business – from marketing and productivity tracking, right through to financial reporting and commissions.

Connective has embedded Yellowfin's BI solution as the reporting and business management component within Mercury, enabling mortgage brokers to quickly, easily and transparently conduct business performance analysis, cash flow reporting, track workload and productivity of employees as well as browse searchable commission statements.

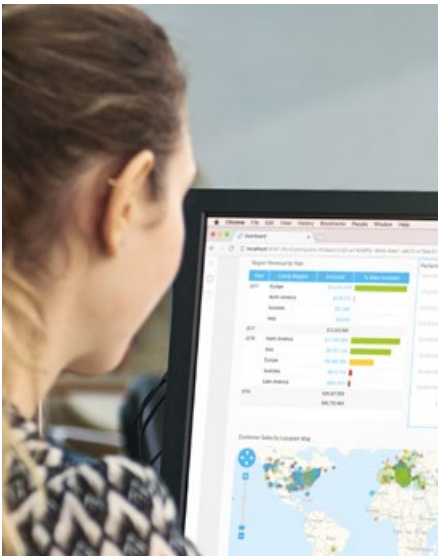
### HBF

HBF is a West Australian insurer that has been delivering health, car, travel, home, contents and personal valuables, caravan, trailer, life and boat insurance to over 900,000 members for over 70 years. In recent years, HBF has developed a wellness program to help members stay fit and well, including physical activity events such as HBF Outdoor Fitness and the HBF Run for a Reason - one of WA's most popular community events.



### Yellowfin has empowered financial services clients to:

- Acquire, retain and optimize customer relations by delivering better products and services
- Improve risk management, quality control and regulatory compliance protocols
- Maximize investment returns and margins
- Gain visibility into, and optimize, transaction processing



Yellowfin has empowered financial services clients to:

- Increase workforce productivity
- Reduce expenditure and improve operational efficiencies
- Seize market opportunities to drive new business



## First Data

First Data Corporation is a global payment processing company headquartered in Atlanta, Georgia, United States. First Data is a provider of electronic commerce and payment solutions. The company's portfolio includes merchant transaction processing services; credit, debit, private-label, gift, payroll and other prepaid card offerings; fraud protection and authentication solutions, credit reporting agency services (through First Data Merchant Services Corporation); electronic check acceptance services through TeleCheck; as well as internet commerce and mobile payment solutions. The company's STAR Network offers PIN-secured debit acceptance at ATM and retail locations.

Yellowfin is at the center of First Data's initiative to provide value-added services to its clientele. First Data uses Yellowfin's BI solution to provide self-service analytics to its Cashcard clientele. The first phase of the Cashcard program at First Data focused on ATM and Terminal handset information, providing clients with access to data relating to transactional amounts, counts by transaction type and time period, as well as comparisons to previous periods and trends.

Yellowfin's ability to quickly deploy and scale to thousands of users has eliminated infrastructure and performance hurdles that other BI toolsets could not address. Because the data that First Data collects and presents is extremely sensitive and under considerable global, country, state and local regulations; it was of the utmost importance that security and access was appropriately managed and developed. Yellowfin was able to satisfy those requirements.

## Government Service Insurance System (GSIS)

The Government Service Insurance System (GSIS) is a social insurance institution providing and administering a pension fund for all employees of the Philippine government, and includes such social security benefits as compulsory life insurance, optional life insurance, retirement benefits, disability benefits for work-related accidents and death benefits. The GSIS also manages the Philippines General Insurance Fund, providing comprehensive protection to assets and properties that have government insurable interests.

The GSIS utilizes Yellowfin within two projects. The first, WEBRGT, provides executive dashboards for the GSIS management team, which report on critical financial and membership status metrics. In the second use case, eGSIS MO, Yellowfin was integrated into a third-party java application to provide a self-service reporting facility that allows GSIS members to monitor their pension, loan status and balance.

The governing and policy-making body of the GSIS is the Board of Trustees, the members of which are appointed by the President of the Philippines. The GSIS workforce consists of 3,104 employees spread across 15 Regional Offices, 25 Branch Offices and 18 Satellite Offices throughout the Philippines.

## Met Traders

Met Traders is a leading financial futures house based in the UK, specializing in proprietary trading and market making across the world's top derivative exchanges, including NYSE Liffe, NYSE Liffe US, CME Group, Eurex, TFX, Montreal Exchange and ICE. Met Traders is part of the Met Group – a diversified financial services group working in asset management, fund management, market making, proprietary trading and corporate finance. Met Traders uses Yellowfin as a cloud-based deployment to internally monitor a range crucial financial metrics.

## RecoveriesCorp

RecoveriesCorp is a contact center specializing in debt recovery solutions, insurance claims recovery and reminder call services, as well as litigation management. Its clients span federal, state and local government, insurance, banking and finance, telecommunications and utilities sectors.

RecoveriesCorp utilize Yellowfin to measure operational and financial performance, across a range of metrics, pushing reports to all levels of management. Yellowfin's ease-of-use and data visualization capabilities have also enabled end-users, throughout RecoveriesCorp, to independently create and explore reporting content. Additionally, Yellowfin has empowered RecoveriesCorp to build more insightful BI content, by combining data from multiple sources into a single report, while reducing time spent on report creation.

RecoveriesCorp has over 300 staff spread across offices in Sydney, Melbourne and Suva.



## Paymark

Established in 1989, Paymark is New Zealand's leading electronic payments provider and is owned by four major banks. Paymark, and its associated company Electronic Transaction Services Limited (ETSL), accept and process debit and credit card transactions from the four major banks and countless other financial institutions. Paymark offers services to merchants, card issuers and acquirers for EFTPOS, eCommerce, mCommerce and ATM payment and related transaction processing. Its network processes more than 60 percent of all retail transactions throughout New Zealand.

Yellowfin's dashboard and reporting solution provides Paymark and its clients with the an industry leading reporting portal. Merchants can now benchmark their business performance with similar companies, view spending trends and gain deeper insight into retail spending in their region or business sector. Yellowfin also enables Paymark's executive team to view transactional data and associated reports in real-time. Paymark also resells the resultant information to its Merchant customers through a secure extranet reporting portal, creating an additional revenue stream for the company.

## SuperIQ

SuperIQ is a leading Australian provider of administration services for Self-Managed Superannuation Funds (SMSF). SuperIQ delivers direct services, both to the public under the Super Concepts brand, as well as white-labeled services for over 20 financial services providers including AMP and one of Australia's four leading banks. SuperIQ provides ongoing services to over 10,000 SMSFs.

SuperIQ offers users a real-time overview of their Super Fund position and performance via the SuperIQ dashboard. The SuperIQ dashboard, underpinned by Yellowfin's BI solution, delivers the complete overview users need to effectively manage their superannuation.

Internally, SuperIQ uses Yellowfin on a day-to-day basis to provide information to SuperIQ management (to support operational and strategic decision-making in order to continuously improve efficiencies and client services) and external brand managers (enabling them to understand their constituents and to drive business growth).

## UCPB

Originally founded in 1963 as the First United Bank (Philippines), The United Coconut Planters Bank (UCPB) is one of the biggest banks in the Philippines, and the 12th largest lender, with assets of \$5.1 billion as of the end of 2012. UCPB has over 100 internal Yellowfin uses, primarily reporting on financial and client service metrics.



SUPER IQ



## Conclusion

The need to effectively and efficiently measure and analyze key metrics – to streamline business operations, segment and engage with customers and seek out competitive advantage – has never been more important in the financial services industry.

In today's fragile economic environment, with fickle customers and uncertain consumer sentiment, Yellowfin enables financial organizations to attain stability, while uncovering new growth opportunities.

Yellowfin makes analytics for the financial services industry easy.

## Find out more

Contact Yellowfin at:  
[www.yellowfinbi.com](http://www.yellowfinbi.com)

And ask for our proven roadmap to assist you to successfully implement Yellowfin into your organization.

