



Enabling custom reporting to meet client needs

The Challenge

Our client received several requests from their clients for customized reports which required manipulation of large datasets at a granular level. This was being done using a combination of Excel spreadsheets and Access databases created and managed by a few key resources, which led to several challenges:

Inefficient processes

Changes to existing reports could take up to a month and required technical support, limiting business agility and customization capabilities for clients.

Dependencies on key individuals

Only a few key people could create the foundational spreadsheets using Excel, making the process time-consuming and not scalable.

Limited audit controls

The existing processes lacked adequate controls, posing an internal audit risk.

How StructureIt helped

The StructureIt team stepped in to create a solution focused on three core elements:

Data Retrieval and Consolidation

Automated data retrieval from multiple sources, including Solvas, Global Office, and WSO.

Customizable Client Files

Developed a standard client file template that could be adjusted and updated on an ad-hoc basis to create derived, client-specific reports without external team involvement.

Automated Notifications and Delivery

Implemented automated notifications and report delivery based on schedules (daily, weekly, monthly) or specific events (e.g., compliance test failures).

Key to the solution was empowering business teams to adapt to client requests independently, without needing to involve extended teams.

The Results

By working within a scalable, data-driven environment aimed at efficiently managing and delivering custom data reports as the loan portfolio grows, our client was able to achieve:

Customization through standardization

A client-centric approach to customized reporting based on efficient, simplified processes and data management.

Scalability to handle more business

Increased capacity to handle more deals without the need for additional support personnel.

Reduced operational risk

Consistent, automated processes reduced reliance on key individuals while delivering agility and flexibility.

Increased Controls

Enhanced approval processes and mechanisms ensured the right information was distributed to the right people.

StructureIt's data-driven reporting solution empowered our client to generate custom reports efficiently. This scalable system adapts to their growing loan portfolio without needing to increase their internal bandwidth, while automated controls ensure their platform's data security.

By continuing their trust in our partnership, we continue to ensure that they have the capacity for ongoing optimization, giving them a competitive edge in the cre and credit market through faster, more insightful reporting.

Collaboration, on your terms

Let's collaborate to craft tailored software solutions that drive your business growth in the CRE and Credit markets.

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