EWSolutions Data Warehouse / BI Assessment and Re-Design Case Study
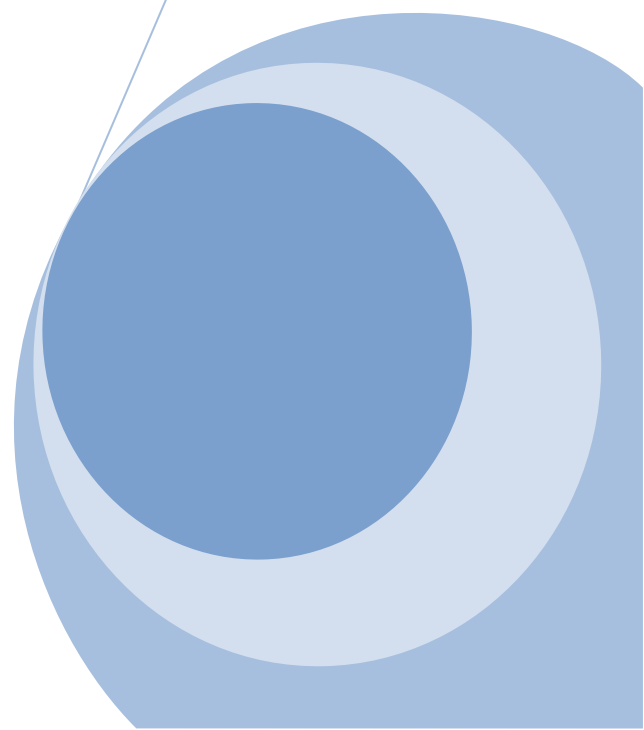
Leveraging Investments in Data Warehousing, Business Intelligence and Analytics

Enterprise data warehousing / business intelligence, data integration, data architecture enabled the growth and expanded capabilities of an over 100-year-old boutique investment management firm.

EWSolutions, Inc.
1/20/2017

Leveraging Investments in Enterprise Data Warehousing and Business Intelligence: A Case Study in How EWSolutions Enabled Competitive Advantage for Financial Services

Started in 1892, Driehaus Capital Management, Inc. provides investment management services to institutional clients, high net worth individuals, and mutual fund investors. They specialize in domestic and international investing, using an aggressive growth style, with the objective of capital appreciation. Driehaus manages over $6 billion in assets spread between institutional portfolios and mutual funds. Dreihaus emphasizes integrity, transparency, and the alignment of the client's interests with the firm's.

Founded by renowned investor Richard Dreihaus, Dreihaus Capital Management is an independent boutique investment adviser managing growth equity investment strategies and multi-asset alternative strategies. With 37 portfolio management, investment research, risk management and trading professionals, it has distinct and differentiated investment approaches.
The investment team consists of:
– Equity portfolio management talent groomed in-house ensuring consistency of investment approach
– Alternative portfolio management with extensive hedge fund experience

Additionally, Dreihaus has a strong operational, compliance, client service and business infrastructure with no outsourcing.

The firm is a pioneer in non-traditional mutual funds, providing alternative strategies within liquid investment vehicles that typically offer more transparency than traditional hedge fund investment vehicles

Dreihaus continues its drive for managing finances for its clients and is committed to improvements in investment management, ensuring that the next 125 years are as fruitful for the company as the first.
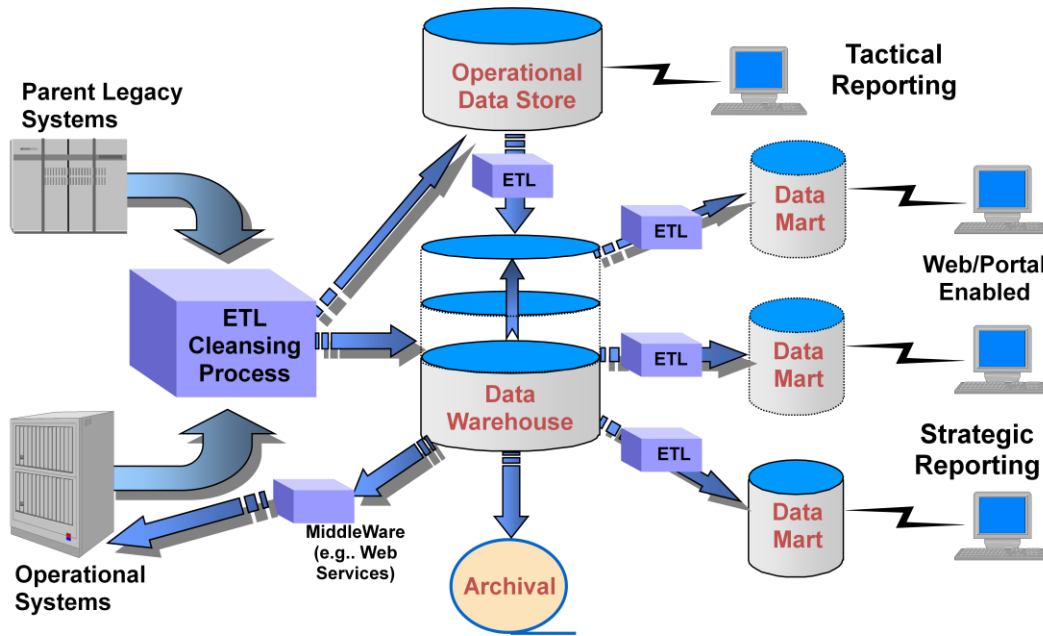

Data Integration challenges raise need for change

Several years ago, Dreihaus operated with a collection of applications and systems that were not integrated and used extremely outdated technologies. Additionally, the company did not focus on the underlying enterprise information management challenges of data architecture, metadata management, data governance, master and reference data management that would enable Dreihaus to take full advantage of the data and information it collected from its activities.

Dreihaus retained industry leader EWSolutions and used its expert consultants to perform a complete enterprise data warehouse / business intelligence assessment. EWSolutions' team of experienced top-level strategists was able to provide the company with exemplary advice, guidance, planning and execution

strategies and recommendations for improvement in all areas of DW/BI (data architecture, data integration, data warehousing and business intelligence, and enterprise architecture).

[EWSolutions'](http://www.ewsolutions.com) consultants brought outstanding credentials and dedication to the partnership while also offering:
- Exceptional experience in all areas of data warehousing and business intelligence assessment, architecture, project management and data integration
- Sophisticated interpersonal communication skill for delivering knowledge transfer
- Thorough understanding of enterprise data warehousing best practices and industry standards, especially in the areas of data warehouse strategy, data architecture, metadata management for data warehousing and business intelligence, master and reference data management for data warehousing and business intelligence, and the project management in these areas
- The invaluable ability to view the technology from the business person's perspective

With the superior guidance of EWSolutions in DW/BI assessment, with clearly defined recommendations for improvement and a series of phased implementation roadmaps, Dreihaus Capital Management was able to plan its new approach to data warehousing / business intelligence confidently with these clearly defined goals:
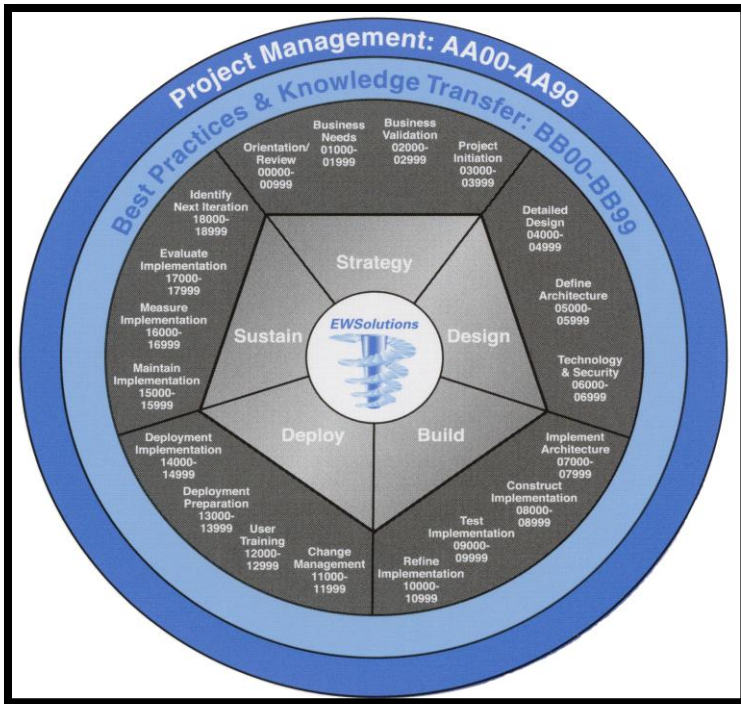1. Plan for improve data warehousing and implement the plan
2. Establish the foundations of enterprise data architecture
3. Improve the current state of data usage for business intelligence
4. Expand the use of the data warehouse
5. Develop a plan for action for improved metadata management

Using senior resources from EWSolutions, Dreihaus was able to meet all the defined goals in the specified period.

Additionally, EWSolutions used its industry leading I3^{sm} methodology for data warehousing and business intelligence on this engagement. The results of this methodology implementation included:
- Analysis of I3^{sm} against current Dreihaus data warehousing / business intelligence practices
- Assessment of gaps between Dreihaus DW/BI practices and industry proven practices in I3^{sm}
- Incorporation of I3^{sm} stages, phases, activities, templates into Dreihaus' DW / BI approach
- Expert guidance for blending I3^{sm} and Dreihaus approaches into a unified method
- Incorporation of new method into selected DW/BI implementation projects

Methodologies enable more rapid assessment, development and implementation through best practices

EWSolutions' I3[sm] methodology for Business Intelligence/Data Warehousing (BI/DW) is a highly customizable, iterative, and workflow-oriented methodology designed to help your organization achieve enterprise BI/DW success effectively. With hundreds of fine-grained tasks with clear objectives, success factors, and responsible parties identified, I3[sm] enables the development of a BI/DW environment with the proper processes, people, and technologies.

The methodology is based on **EWSolutions'** consultants many years of helping clients successfully realize outstanding benefit from their BI /DW efforts. I3[sm] underscores **EWSolutions'** numerous award-winning efforts and thought-leading practices and supports integration with Enterprise Information Management (EIM), data governance, and managed metadata environment (MME) efforts. I3[sm] is a self-sustaining, iterative, and customizable methodology that helps organizations to realize continuous return on investment (ROI) by identifying new business opportunities, improving efficiencies, and increased data quality through a BI/DW program.

Methodology Critical Points:
With highly customizable task narratives, templates, and examples, I3[sm] allows any organization to fit the methodology to its efforts, not the other way around. The methodology adds value to a BI/DW program without adding unnecessary complexity or unjustified efforts.

An iterative methodology with overlapping phases and activities, I3[sm] helps an organization anticipate and reduce risks within and across phases, providing strong validation of scope and results, while efficiently utilizing all resources, including time, personnel, funds, and effort.

The I3[sm] workflow provides discipline and manageability to any BI/DW program. A BI/DW program can be very complex – using the I3[sm] methodology breaks the effort into manageable, measurable tasks to know the current state, target state, and next steps. With its clear success criteria and best-practice estimates, the methodology helps an organization achieve discipline and increase visibility to assess progress and identify needed adjustments efficiently and effectively.

Assessment, Roadmaps, Implementation Support Provide Foundations for Growth

Dreihaus' senior business community leadership responded favorably to the assessment and roadmaps provided by EWSolutions, especially the personal involvement of EWSolutions' president, David Marco. Capabilities for DW/BI were raised significantly at various levels and the organization continues on its DW/BI foundational development paths.

EWSolutions Overview

EWSolutions is comprised of superior strategic and tactical planning analysts who offer government and commercial clients innovative and authoritative solutions to assist with assessments / strategies in all areas of enterprise data / information management, technology implementation in metadata management, data warehousing (ETL, BI, data and text mining, etc.), business intelligence implementation, data governance program development and implementation, enterprise data management framework development and implementation, data migration planning, disaster and contingency planning, and strategic solutions for business/technology issues. The company's extensive client base spans the government and the health, life sciences, insurance, financial services, consumer products, retail, manufacturing and high-tech industries. For more information on our strategic consulting services, high-value implementation services, methodologies, or world-class training call (630) 920-0005 or email us at Info@EWSolutions.com