



## Overview

### Customer Profile

Barclays provides multi-channel services, such as online banking, telephone banking, and branch banking to its personal customers, and commercial wholesale banking services across the UK, Europe, and Africa. Over 55,000 people are employed within the Barclays group.

### Business Situation

The bank needed to cut costs to meet shareholder demands in part by improving productivity and customer service. The bank must ensure the right people with the right training are deployed effectively throughout the organization. This requires rapid access to accurate, up-to-date information for decision support.

### Solution

The bank standardised its BI systems on the Microsoft SQL Server 2000 Analysis and Reporting Services platform, fronted by a feature-rich web-based Microsoft .Net interface implemented using Aspire technology by Ridgian.

### Benefits

- Major cost savings
- Rapid return on investment
- Single source of information eliminates uncertainty
- Reliable platform and better access to information improve productivity
- Familiar tools promote ease of use

## Barclays Drives Significant Returns Thanks to Leading Edge Business Intelligence Solution Built on Microsoft Technologies by Ridgian

“Within 3 months, we had a central repository of reliable people-based information, easily accessible to both managers and strategic decision-makers. Converting data to meaningful business information is crucial to driving maximum value for our shareholders.”

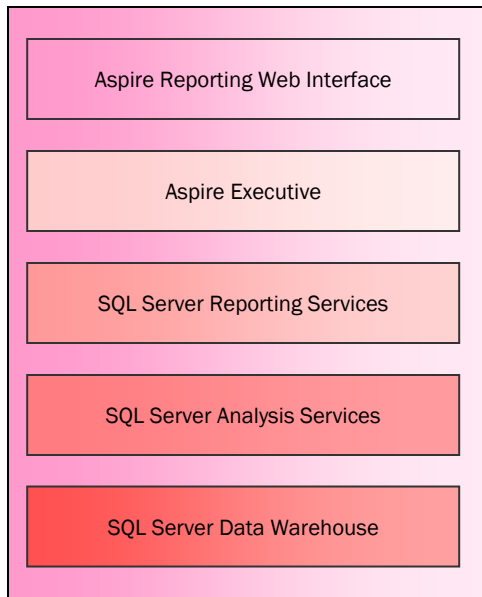
Kevin Rodgers, Head Of Information, Barclays

Barclays promised to deliver shareholders cost reductions of £1 billion and needed to find new ways of streamlining business processes and increasing efficiency to help meet this target. As part of this exercise, the bank chose to standardise its Business Intelligence platform on Microsoft® software, including SQL Server Analysis Services and SQL Server Reporting Services. Barclays chose Microsoft BI software over the alternatives for its rich functionality, high performance, strong compatibility with tools already in use and extremely competitive total cost of ownership. Barclays chose Microsoft Partner Ridgian to carry out the implementation and has benefited from the incorporation of Reporting Services into Ridgian’s Aspire platform, built using Microsoft Visual Studio .Net. Aspire provides a streamlined user experience, simplifying the process of performing complex business analysis and decision-making. Barclays Bank expects to see significant financial returns through increased productivity, helping it to quickly achieve further cost-savings targets.



**“We were extremely impressed by the rapid and elegant integration of our information into a unified repository via Aspire and Reporting Services.”**

Kevin Rodgers, Head of Information, Barclays



## Situation

Like most large enterprises, banks are increasingly being held accountable to customers and shareholders. With business processes under scrutiny and mounting pressure to reduce operational costs, it is no longer enough to rely on individual information gathering and reporting processes within different teams.

Organisations such as Barclays Bank are starting to see the value in rapid centralised access to business intelligence that helps workers deliver services that keep the competition at bay.

One of the world's largest financial institutions, Barclays Bank, provides multi-channel services, such as online, telephone, and branch banking to its retail and wholesale commercial banking customers across the UK, Europe, and Africa. Barclays employs 55,000 staff, with over 41,000 operating from the UK. These employees provide customer services to around 14 million personal customers from distributed sites and offices.

The majority of people-based information at Barclays is held within a SAP system. Although this offers comprehensive data capture facilities, turning this data into meaningful business information was presenting challenges. Also, SAP is not the only information repository. A data warehousing solution was required that could co-ordinate multiple data sources from various locations and formats.

Barclays was concerned that inflexibility and delays in accessing information would inhibit strategic decision-making, which could impact competitiveness. “The simplest things were difficult, such as gaining an overall picture on sickness patterns, resignations, and recruitment planning, and we wanted to

improve control over access and tracking,” says Rodgers.

Equally important was the need to find a software solution that could meet all the requirements of a business of Barclays' scale without prohibitively high cost of ownership. “As you can imagine, monitoring and managing staff in an organisation of this size is expensive,” says Rodgers.

The bank was also keen to consolidate its Business Intelligence onto a standard platform that would enable better integration with other strategic systems, such as Microsoft Office Share Point Portal Server 2003. Facilities such as scheduled delivery of reports in Excel and PDF formats were also important.

## Solution

Ridgian recommended the Microsoft BI suite in conjunction with its own Aspire technology to provide a standard reporting platform with an enhanced, feature-rich user interface.

Barclays chose the Ridgian offering in preference to rival solutions based on SAP BW, Business Objects and Crystal Reporting. “We were extremely impressed by the rapid and elegant integration of our information into a unified repository via Aspire and Reporting Services. We were convinced by the efficient way that Microsoft and Ridgian technologies work together, combining simple canned reports with more complex analytical capabilities,” says Rodgers. “The initial version of the system went live inside 3 months, and we are now building on that by integrating more and more of our valuable information”.

“Our relationship with Ridgian has grown as our focus on BI has increased. Ridgian and its recommended suite of products perform and deliver at scale”

Kevin Rodgers, Head of Information, Barclays

Even more important to Barclays was the scalability of the solution to meet the needs of an organisation of over 55,000 users. “Our relationship with Ridgian has grown as our focus on BI has increased. Ridgian’s experience is obvious—it can speak in a corporate language and its products perform and deliver at scale,” says Rodgers.

A partnership between Microsoft and service provider Ridgian forms the basis of the Barclays implementation. Ridgian provides development and consultancy for Microsoft technologies in an on-going contract as the system expands. Ridgian has worked closely with Barclays on BI and other applications since 1998.

The BI system is hosted on Microsoft Windows Server 2003. ETL and Data Warehousing are provided using Microsoft SQL Server 2000. Data is imported from various sources, including SAP and other database systems, flat files and Excel spreadsheets.

Microsoft SQL Server 2000 Analysis Services is used for OLAP data analysis and reporting. Data Analysts are able to connect directly to the cubes using Microsoft Excel, giving total flexibility via a familiar tool. Leading edge facilities for forecasting and “What If” analysis allow Barclays to stay one step ahead of the competition.

The technology has allowed the wider user group within Barclays to gain access in a more controlled environment via Microsoft SQL Server 2000 Reporting Services. Reports take data directly from the OLAP cubes. Performance is excellent in terms of on-line report delivery and rapid processing times ensure the information is always up-to-date.

Access to Reporting Services reports is achieved via a thin bespoke user interface built on Ridgian’s Aspire technology with

Microsoft Visual Studio .Net. This provides a branded, stream-lined browsing experience where users are effortlessly directed to areas of reporting that are crucial to their own corporate responsibilities. Data entry and correction facilities can be provided alongside the reporting itself. Full integration with Reporting Services ensures that the custom layer is a one-off deployment, with subsequent development, deployment and management of reports achieved via Reporting Services Report Designer and Report Manager. The user interface was created using Ridgian’s Aspire technology, a productivity tool that allows rapid development and maintenance for data-centric websites.

Reporting Services subscriptions are used to automate the process of transferring data directly to other users and applications, in formats such as PDF, Excel and XML. Whilst users are encouraged to view information online, the facility does exist to receive reports regularly by email or delivery to a file share.

A customisable user dashboard with Red-Amber-Green reporting provides an “at a glance” snapshot of key measures, allowing immediate identification of any anomalies. Users can then explore problem areas in more detail via drill down and drill through functionality.

Combined, these technologies deliver an enhanced Business Intelligence system across the organisation. Tools that enable IT administrators to centrally control information access and security ensure the bank has full control over sensitive information without sacrificing employees’ ability to share data.

## Benefits

### Major Cost Savings

Tools such as Analysis Services and Reporting Services are integrated into the

## “Aspire with Reporting Services is now part of our business strategy and supports our business drivers in an unrivalled way”

Jason Betteridge, Managing Director, Ridgian

standard Microsoft SQL Server offering. Unlike rival products, one licence cost covers all. This eliminates on-going annual licensing and allows new users to be added with no incremental expenditure. Microsoft Business Intelligence offers increased functionality and performance at a cost that is nothing short of revolutionary. Barclays also found consultancy costs to be far lower than they had experienced with technologies such as SAP BW and Cognos.

Ridgian's Aspire technology was instrumental in reducing costs during the development phase. Aspire provides an architectural platform and navigation model for developing websites using Microsoft Visual Studio .Net. It reduces much of the repetitive work required for all data-centric websites, freeing developers to concentrate purely on the business needs of the particular project.

### **Rapid Return on Investment**

It was imperative that Barclays Bank could foresee significant returns soon after the technology implementation to remain on target to meet its promise to shareholders. Initial implementation was achieved extremely quickly. The project commenced in January 2005, and the first phase went live on schedule at end of March 2005.

Already the need for each business unit to maintain its own BI monitoring facilities has been eliminated. Analysts have the means to make the right decisions. This naturally produces cost savings and reduces overruns. Managers have the means to spot problems in areas such as sickness absence and resignations and can see instantly where changes need to be made to improve efficiency.

The bank will carefully measure cost benefits as the project progresses, but Rodgers states that Barclays are already seeing early returns: “All of our products undergo a strict value-

based management assessment. But we are absolutely certain that from what we can see and measure today, the return on investment will be sizeable.”

### **Passing Benefits on to Customers**

Rapid access to valid and timely information allows for efficient planning of recruitment and training schedules. This information is focussed particularly on customer-facing staff in call centres and branches. Key Risk indicators such as “Rookie Ratio” alert planners to business areas with disproportionate levels of inexperienced staff. The goal is to ensure that all areas are fully equipped to respond quickly and efficiently to customer requests, and potentially help more customers each day.

### **Easy to Use for Employees**

Barclays expects employees to see numerous improvements in their day-to-day work with better control over information. The application offers a rich user experience with information focused to the needs of the particular user. In many cases, managers can see at a glance whether there are any problems they need to address, and hence spend more of their time managing their staff rather than scrutinising badly organised data.

“Aspire with Reporting Services is now part of our business strategy and supports our business drivers in an unrivalled way,” says Jason Betteridge, Managing Director, Ridgian.

## For More Information

For more information about Ridgian products or services, call Ridgian on 0121 233 7200. To access information via the World Wide Web, go to:  
[www.ridgian.co.uk](http://www.ridgian.co.uk)

For more information about Microsoft products or services, call the Microsoft UK contact centre on 0870 60 10 100. To access information via the World Wide Web, go to:  
[www.microsoft.com/uk](http://www.microsoft.com/uk)

For more information about Barclays products and services, visit the Web site at:  
[www.barclays.co.uk](http://www.barclays.co.uk)

## Aspire Business Solutions

Ridgian's Aspire Reporting application, part of the Aspire Business Solutions Suite provides an elegant, easy-to-use, feature-rich reporting-browsing environment with the ability to cater for strong brand identity. Aspire's full integration with Reporting Services delivers the flexibility of a custom application whilst retaining report design, deployment and management within the standard Microsoft Reporting Services suite.

For more information about Aspire, go to:  
[www.ridgian.co.uk](http://www.ridgian.co.uk)

## Microsoft SQL Server

Microsoft® SQL Server is the business world's chosen environment for transforming information into impact. For more information about Microsoft SQL Server System, go to:  
[www.microsoft.com/sqlserver/](http://www.microsoft.com/sqlserver/)

## Software and Services:

- Microsoft Windows Server 2003
- Microsoft SQL Server 2000
- Microsoft SQL Server 2000 Reporting Services
- Microsoft SQL Server 2000 Analysis Services
- Microsoft Visual Studio .Net
- Microsoft Office Share Point Portal Server

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Document published May, 2004

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