



Blackfinch Azure Data Platform

About the client

With a heritage dating back over 25 years, Blackfinch are investment specialists with a focus on sustainability. Their services encompass investment strategy and management supplemented with extensive adviser support and a focus on delivering value through expertise and a high-quality service.

Key metrics

- £700m+ AUM
- 140 team members
- 500+ partner firms
- 25 years market experience across Energy, Ventures, Investments, Asset Management & Property

"Altus have played an invaluable role getting Blackfinch set up on our new Data Platform. Altus quickly understood our data needs and created a plan that has delivered on time a fit for purpose data solution and working Sales Dashboard that provides Blackfinch meaningful and actionable data from across disparate systems in a business-friendly format"

Claire Gazard
Head of Operations

Scenario

Blackfinch were utilising Power BI for MI reporting but were struggling with data accuracy across disparate data sources.

It was not possible for users to self-serve their reporting needs, nor was it possible to obtain clear & actionable insight from the data.

Blackfinch engaged Altus Consulting to build a new Data Platform architecture & reporting solution which would enable their sales team to view their accounts, targets, opportunities, pipeline cases and investments complete with trend analysis vs prior performance.

Altus Consulting Engagement

Working in partnership throughout the 12-week engagement, Blackfinch engaged Altus to:

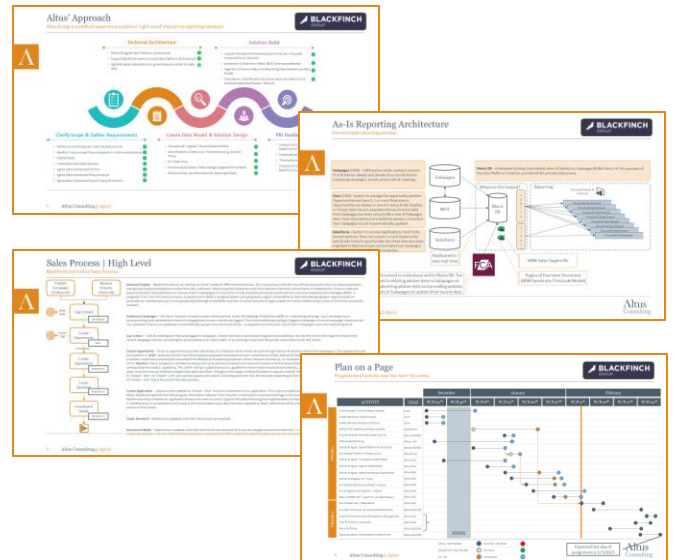
- Architect a scalable data platform aligned to industry best practice
- Build the new Data Platform Architecture in Microsoft Azure Synapse Analytics
- Ingest data from multiple sources into the corporate Data Lake
- Model the data & build a Data Warehouse
- Build the pipelines to populate the Data Warehouse
- Create views required to support the Sales dashboard
- Build a series of Power BI sales dashboards
- Deploy the data Platform into production and hand over to BAU

Understanding the business

Working with experts from across the business, Altus ran workshops to understand the end-to-end sales process and the systems used to support the variety of sales activity tasks Blackfinch perform.

Through this business-wide engagement we were able to gain an understanding of the meaning of the sales data. We worked collaboratively to agree a scope and baseline set of requirements. A plan was then drawn up to track progress throughout the engagement.

Altus & Blackfinch worked together to recruit a technical specialist to support the data platform once the engagement concluded.

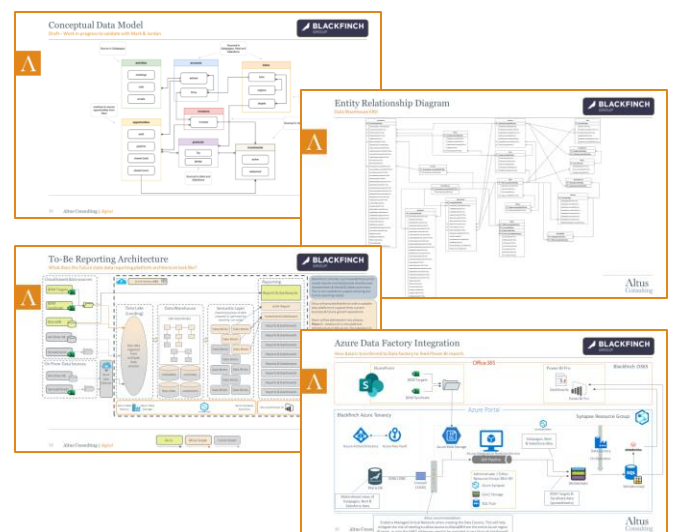


Architecting the platform

Altus created a data dictionary, conceptual data model and an entity relationship diagram for the data warehouse database.

We worked with Blackfinch experts to review & refine & were able to agree a common understanding of the data across the business, along with mastery / duplication rules. We also highlighted data quality issues which were passed back to the business to correct.

In parallel, we worked to define the target state architecture and created a run book instruction manual to enable the Azure components to be created.



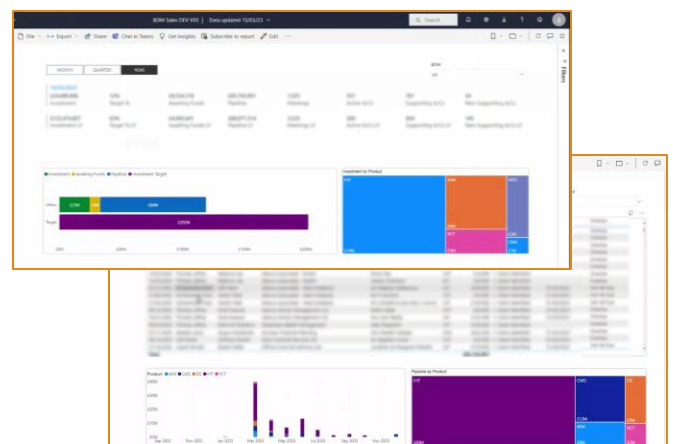
The result?

We ran daily stand-ups where we were able to obtain client feedback on the dashboard development. This enabled us to obtain timely feedback so that we could iterate improvements over and above the specified requirements.

Over a 12-week period we delivered half a dozen new dashboards drawing data from 3 different databases & various Excel spreadsheets.

The Blackfinch sales team now have accurate, timely & informative MI which will help them understand how they are performing against their sales targets.

Altus facilitated the handover of a fully documented & extensible data platform to Blackfinch IS & BAU teams to ensure they have the internal capability to support the platform going forward.



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