Strategy₿

Financial Services Solutions Guide

Transforming Financial Services
with Trusted Data

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1. Introduction

> ## 64% of organizations collect data from between 100 and 499 sources daily.
>
> *Data Readiness for Impactful Generative AI*, Research Report, ESG by TechTarget

Modern financial services organizations are under pressure to do more with their data—faster, more securely, and at greater scale. But while the tools have evolved, the core challenge remains the same: **turning fragmented, inconsistent data into real-time, trusted insights**.

This guide showcases how leading institutions across banking, insurance, lending, and payments are transforming their data strategy to support smarter decisions, stronger governance, and scalable impact. From building solid data foundations to embedding insights in everyday workflows, these stories offer practical examples of success with Strategy One.

Table of Contents

2. Data Foundation for a Single Source of Truth

Getting the data structure right is the most important step any FSI organization can take—especially when preparing to scale analytics, AI, or self-service.

In this section, we look at how two financial institutions tackled fragmented data structures by centralizing their data and eliminating silos.

Learn how **Alabama Ag Credit** replaced over 30 legacy reports with a unified, real-time dashboard, and how **Enova International** standardized KPIs and consolidated data models across a diverse analytics ecosystem.

Lack of clear data ownership poses challenges for 46% of organizations.

Data Readiness for Impactful Generative AI, Research Report, ESG by TechTarget

Unifying Disparate Systems into a Single Source of Truth

Alabama Ag Credit a regional lender serving 8,000 agricultural clients across 40 counties, transformed its reporting model by building a unified data foundation. With no prior in-house BI expertise and highly manual reporting workflows, they faced slow access to KPIs and fragmented data across credit, lending, and finance systems.

By adopting Strategy's cloud-native analytics platform, the team **consolidated siloed data sources** via APIs, SQL, and URL connectors; **automated a critical performance dashboard** tied to incentive compensation; and **enabled real-time access for every role** including executives, branch managers, and lending officers. This upgrade automated the production of over 30 manually created reports, reducing credit analysis from a weeklong effort by 8 people to a 30-minute validation by 2.

30
reports automated

100%
user adoption across the organization

40%
additional data unlocked

Daily
performance data update
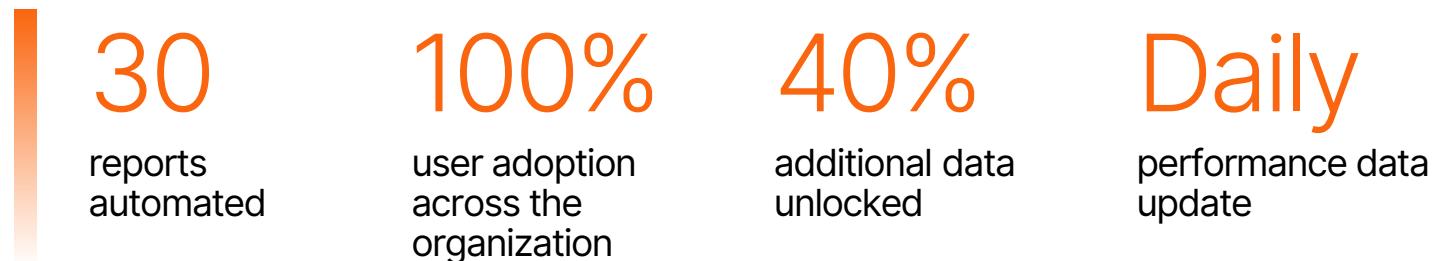
"This basically just gives us a one-stop shop. We're able to go to one place and have all these different data sources in one place.

Matt Satcher
Vice President, IT Systems, Alabama Ag Credit
Watch the on-demand session to learn more >

Standardizing Metrics Across a Reporting Environment

Enova, a leader in digital financial services, serving over 12 million customers, faced a challenge common to high-growth fintechs: reporting sprawl. Over time, acquisitions and specialized teams led to an ecosystem with multiple BI tools spanning Strategy, Tableau, Streamlit, Excel, and Python all in active use.

The problem wasn't the tools: it was the data. Different teams reported similar metrics using different sources—creating confusion and risk during key business reviews.

Enova took a data-first approach to fix this, standardizing KPIs and centralizing data models before focusing on tool migration. Strategy became the unified platform for enterprise reporting and executive dashboards—while other teams could continue to use their preferred tools so long as they pulled from the same consistent data sources. This shift enabled Enova to move from fragmentation to actionable insights—streamlining reporting across shared data sources, and empowering the team to successfully roll out a suite of intuitive, adoption-friendly dashboards in Strategy Library.

" We don't tell teams to stop using tools like Python. But we need everyone using the same data sources.

Samundar Singh,
Senior Business Intelligence Manager, Enova

Watch the on-demand session to learn more >

12M+
customers served by a unified BI backbone

$59B
in loans supported by consolidated data

Automated alerts
trigger real-time Slack messages for rapid response

Improved governance
via content groups and semantic modeling

3. Semantic Layer for a Shared Understanding

Scaling data architecture to handle an increasing volume of data for AI application is a major challenge identified by 43% of organizations.

Data Readiness for Impactful Generative AI, Research Report, ESG by TechTarget

A governed semantic layer transforms raw data into usable business logic—powering trusted insights across teams, tools, and time zones.

This section explores how financial organizations are using semantic layers not just to standardize access, but to deliver real-time intelligence where decisions happen.

See how **Fannie Mae** exposed certified data products via APIs for use across risk and treasury systems, and how **Banco Hipotecario** replaced fragmented BI with a unified semantic foundation and AI-powered dashboards.

Empowering Treasury Apps with Data-as-a-Product

Fannie Mae®

Fannie Mae is one of the largest providers of mortgage financing in the U.S., backing over 1.5M home loans. To mitigate interest rate and pricing risk, Fannie Mae's Treasury and Risk teams run daily forecasting models to guide high-stakes trading decisions. But these insights were buried in a sprawl of disconnected spreadsheets, macros, and reporting silos, slowing time to action.

Fannie Mae turned to Strategy to modernize reporting and operationalize data sharing. Using **Strategy's semantic layer, REST APIs, and role-based access controls,** they centralized reports across risk and treasury functions and exposed data products directly to trading applications. Now, business users can securely access real-time metrics: without duplication, rework, or manual collation.

- Unified reporting for risk, treasury, and trading teams

- Real-time access to metrics via REST API and data mesh architecture

- Eliminated Excel macros and manual data prep

- Maintained strict security through SSO and role-based access

- Decreased time to insight for pre-trade analysis

"
With REST APIs and role-based governance, we can expose data products in real time—without losing control. That means faster access, better decisions, and a single version of the truth across applications."

Sheel Ratan,
Software Engineering Manager, Fannie Mae

Watch the on-demand session to learn more >

Replacing Legacy with a Semantic Layer and AI-Powered Insights

Faced with disjointed reporting, delayed insights, and ungoverned data sprawl, Banco Hipotecario, a commercial bank and mortgage lender in Argentina, needed a better way to unify reporting and enable real-time decision-making. After a comprehensive assessment of Power BI revealed fundamental issues—data silos, inconsistent reports, and a lack of interactivity—the bank turned to Strategy One.

With Strategy One, Banco Hipotecario implemented a **governed semantic layer to unify data across teams and provide a single source of truth**. With the semantic layer in place, AI-powered dashboards now deliver instant insights to decision-makers. Middle managers and executives now explore data dynamically, accelerating decisions across the bank.

- Unified reporting through a semantic layer that eliminates silos

- AI-powered dashboards created without manual lift

- Conversational analytics that forecast trends in plain language

- Self-service access for middle managers and top executives

- Real-time decision-making supported by embedded analytics

"We built a centralized browser that consolidates all our available reports, providing our organization with a single window for access."

Product Representative, Banco Hipotecario

Read the case study to learn more >

Table of Contents

4. Ensuring Governance & Compliance

Governance is more than control—it's about consistency, trust, and compliance, and nowhere is it more vital than in financial services.

In this section, we examine how two organizations implemented strong governance models to improve auditability, reduce redundancy, and prepare for future scale.

Discover how **goeasy** launched a BI Center of Excellence with a certified KPI framework for 2,000+ users, and how **Sava Insurance** built a dynamic data dictionary to streamline regulatory reporting and lay the groundwork for group-wide consolidation.

Consistency across data sources is an issue raised by 44% of organizations. 40% of respondents prioritize verified, secure, and transparent data.

Data Readiness for Impactful Generative AI, Research Report, ESG by TechTarget

Scaling Insight and Governance with a BI Center of Excellence

2,200+
active users

332k
dashboard interactions over 60 days

150k
views on a single KPI dashboard

40TB
data warehouse, now under strategic consolidation to cut in by half

93%
of business reporting governed by COE

As a non-prime lender serving over one million Canadians, goeasy's challenge wasn't just volume. It was consistency.

As goeasy scaled, the need for standardized KPIs across business units became clear. To restore order and scale adoption, goeasy built a BI Center of Excellence powered by Strategy. They began with a cross-functional power user group, mapped out actual vs. desired data usage, and launched a multi-year KPI rationalization effort. The result: **one standardized KPI list across all business units, product areas, and functional groups—with each metric certified and governed.**

Strategy Library and web became the default destination for 2,200+ users, each grouped by data maturity: Minimalists, Curious, and Enthusiasts. The minimalist dashboards, including the EasyFinancial Scorecard, deliver intraday KPIs updated five times a day—fueling 150K+ views in two months alone.

We have one central definition for the particular KPI—not that the other six aren't required, but they can't all have the same name. "

Jide Adeoye,
Director of Business Intelligence, goeasy

Table of Contents

Creating a Dynamic Data Dictionary to Streamline Compliance

Sava Insurance, Slovenia's second-largest insurer, used Strategy's semantic layer as inspiration to design a custom-built application for documenting and governing its data warehouse. Facing challenges like complex architecture, fragmented data systems across subsidiaries, and limited documentation standards, the team created a **centralized metadata solution using Strategy Library, transaction services, and APIs.**

After migrating from SAP BusinessObjects to Strategy, the goal was to **eliminate redundant tables, accelerate onboarding, and prepare for future consolidation** across the Sava Group. The result is a live, dynamic data dictionary that enables efficient collaboration between developers, analysts, and regulators, ensuring a streamlined and efficient compliance processes.

"One year after we implemented our solution, we can measure the impact. We've saved storage and man-hours, improved compliance, and reduced redundancy—all by building on what Strategy already made possible."

Matic Hren,
Business Intelligence Architect, Sava Insurance

Watch the on-demand session to learn more >

500 TB
storage saved by eliminating redundant data

€80K
saved compared to external tooling

17
legacy reports in BusinessObjects decommissioned

Full compliance
live documentation supports regulatory requests and onboarding

5. Driving Efficiency Through Adoption

Only 23% of organizations have fully seamless data integration.

Data Readiness for Impactful Generative AI, Research Report, ESG by TechTarget

Even the best data strategy fails without adoption. This section focuses on how financial organizations embedded insights into daily workflows to drive productivity, speed, and smarter service.

From frontline agents to executive teams, these companies made analytics a habit—not a hurdle.

Learn how **Renasant Bank** built a role-based data ecosystem used across business units, how **Amica Mutual Insurance** empowered claims and sales teams with real-time insights, and how **Prisma Medios de Pago** equipped sales reps with AI-powered assistants that surface client trends in seconds.

Driving Enterprise Adoption with Role-Based Dashboards

Renasant Bank, offering lending, banking, wealth management, and mortgage across 280 locations in the Southeast, takes a holistic approach to analytics—anchoring its data strategy around three pillars: people, data, and technology. The goal is to equip every employee with the right insight at the right time, using a centralized ecosystem.

Starting with high-value use cases, Renasant built out a **full-stack enterprise platform that now powers dashboards, HyperCards, mobile apps, and automated distributions** across business units. By prioritizing data quality at the source, and measuring active adoption with platform analytics, the team has turned data consumption into a daily habit across 3,200 employees. Renasant is also in the pilot program for Strategy Mosaic.

- Role-based dashboards aligned to job function

- Real-time insights delivered via mobile, Hyper, and embedded CRM workflows

- Simplified views around each user's core KPIs

- Active user adoption tracked to ensure business value
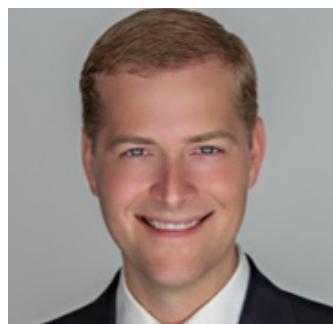
"*Our two biggest assets are our people and our data. Strategy helps us give the right people the right data at the right time to make the best decisions for our customers and our business.*

Greg Owings,
Director of Enterprise Strategy,
Renasant Bank

Watch the on-demand session to learn more >

Empowering Claims and Sales with Real-Time Insights

2 in 3

employees use Strategy analytics

90%+

adoption among claims leadership

$480K

new cross-sell revenue with Hyper

150

legacy reports decommissioned

30%

growth in QRC usage post-migration

20%

platform adoption within months of Library launch

Amica

Amica places a premium on empathy and responsiveness, a commitment reflected in the data strategy: providing representatives and claims analysts with instant access to insights—without requiring custom integrations or retraining. Using Strategy, Amica enhanced performance across call centers, client services, and sales. Today, two-thirds of employees use Strategy-powered dashboards. One initiative generated more than $480,000 in new revenue by surfacing umbrella policy upsell opportunities in real time—precisely when customers were qualified and engaged.

Amica also transitioned hundreds of dashboards to Strategy Library—reducing strain on infrastructure, retiring 150 legacy reports, and enabling cleaner workflows for more than 1,000 users.

"It's easy for new team members to transition to utilize the product. Strategy's UI is modern and sleek, but it's also intuitive.

Cory Cloutier,
Business Intelligence Supervisor, Claims, Amica

[Read the case study to learn more >](#)

Using AI-Powered Assistants to Deliver Sales Intelligence

PRISMA medios de pago

To help their sales team act quickly on client trends, Prisma Medios de Pago, a payments leader in Argentina, built an AI-powered assistant that delivers transaction insights on demand. The goal: give account executives fast, reliable answers before client meetings—without sifting through multiple dashboards or reports.

Working with the Strategy team, Prisma built and tested a chatbot integrated with their governed semantic layer. The process included **defining core sales KPIs, curating datasets, building a knowledge base for Spanish-language synonyms, and extensive real-world testing**. Sales reps now rely on the bot to identify drop-offs, compare performance, and forecast future behavior, equipping them to walk into client conversations with data-backed proposals.

"

Without clean and well-modeled data, we couldn't do this. A robust semantic layer enables access."
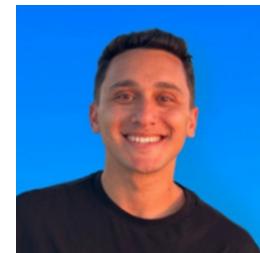
Matías Girard,
Business Intelligence Manager, Prisma Medios de Pago

Watch the on-demand session to learn more >

5B+
transactions processed annually across 12 countries

AI assistant
deployed to commercial team

Advanced insights
like variable impacts and forecasts, available to users within seconds

6. Meet the Data Demands for FSI

Across banking, insurance, lending, and payments, one thing is clear: modern data strategies must go beyond dashboards. From foundational architecture to flexible semantic layers and governed KPIs, financial organizations are investing in platforms that deliver trust, speed, and scalability. Those that succeed aren't just visualizing data—they're operationalizing it, embedding intelligence into every decision and every role. Strategy makes this possible.

Ready to unify your data, empower your teams, and accelerate time to insight? Explore Strategy Products:

Strategy Mosaic delivers the Universal Intelligence Layer—a vendor-neutral semantic foundation that unifies data access, governance, and analytics across tools, clouds, and teams. It eliminates inconsistent definitions, fragmented governance, and cloud lock-in, giving enterprises a trusted, AI-ready view of their data and accelerating how intelligence is modeled, governed, and shared at scale.

Strategy One is the world's most comprehensive platform for data analytics at scale. It offers the broadest array of insight delivery options, including best-in-class mobility, seamless embeddability, and integrated GenAI analytics. Built on a containerized, cloud-native architecture, One simplifies analytics management, making it easy to deliver AI-driven data experiences everywhere.

Learn about Mosaic

Explore Strategy One

Strategy^B