

## Enterprise financial group solves data prep challenge

Dell Financial Services leverages Toad for data preparation and makes strides with its advanced analytics practice



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*Johnathan Walker, Data Scientist, Decision Science and Strategy, Dell Financial Services*

### CUSTOMER PROFILE



<b>Company</b>	Dell
<b>Industry</b>	Hardware and software
<b>Country</b>	United States
<b>Employees</b>	5,000+
<b>Website</b>	<a href="http://www.dell.com">www.dell.com</a>

### BUSINESS NEED

The Decision Science and Strategy team at Dell Financial Services needed a new advanced analytics platform that could help streamline its day-to-day tasks of creating customer and credit risk score cards.

### SOLUTION

Analytics work is 70 percent preparing data for analysis. Toad Data Point enabled the team to access financial data from multiple sources for downstream integrated analytics, as well as to more easily perform query editing and data manipulation during data preparation.

### BENEFITS

- Ability to extract data from multiple feeds
- Easy query editing using the visual query builder and intuitive SQL editor
- Secure data manipulation for data preparation and assessment

### SOLUTIONS AT A GLANCE

Data preparation and Big Data Analytics

Consider the number of customers that any large enterprise business like Dell has to service — and then consider how many of those customers purchase products and services on credit. It's no walk in the park for teams looking to mitigate potential financial risk.

Luckily for Dell, the Decision Science and Strategy team within its Financial Services group is strictly devoted to data modelling and predictive analytics for risk management purposes.

When a Dell customer wants to apply for credit, team members create an application scorecard to evaluate the customer's credit worthiness. The team uses the data to not only approve specific customers but to develop strategies for all credit approvals, credit limits, pricing and other related details. This team also does modelling for fraud and other financial areas.

The team does business analysis and data modelling by looking at financial data that the company receives from credit bureaus such as Experian and Dun and Bradstreet as well as Dell's own internal performance data for existing customers.

The team's customers are internal members of the Financial Services group. When one of the customers has a specific business problem, the team identifies the available data sources — Dell's Teradata and Oracle databases, as well as from external sources. Using Toad Data Point, the raw data is queried, blended, cleansed and grouped into smaller buckets to help with data mining for discovering insights. Statistica predictive analytics software is then used to create a predictive or prescriptive model, followed by further analysis to develop a strategy to determine whether customers should be granted credit or declined.

In addition to one-off analysis for specific customers, the team does scheduled reporting on a quarterly basis to look at the performance of the score cards and models over time. "We run population stability indexes to make sure that everything — all the inputs — that make up the models are stable," a team member Johnathan Walker says. "If things start to change, then we need to redevelop our score cards."

For many years, the team used the SAS advanced analytics solution to do this modelling for the Financial Services group. Using SAS required specialized skills for working with procedural code, and it could be time-consuming. Eventually, Dell put forth an enterprisewide initiative to leverage Quest's award-winning data preparation and analytics software. The team spends up to 70 percent of its time on data preparation, and it was easy to see that switching to Toad Data Point saved time and streamlined day-to-day data preparation.

"Toad Data Point was a key part of making the move from SAS to Statistica possible," Walker says.

"All in all, it's a very easy-to-use, convenient tool for accessing multiple data sources."

*Johnathan Walker, Data Scientist  
Decision Science and Strategy  
Dell Financial Services*

## PRODUCTS & SERVICES

### SOFTWARE

Toad Data Point

## MULTIPLE CONNECTION POINTS

“For a lot of the data exploration we do, we need to consolidate data from multiple sources,” Walker says. “One of the strongest benefits of using Toad Data Point is the ability to connect to different database management systems simultaneously.” The Decision Science and Strategy team pulls data from Teradata, SQL Server and Oracle databases, as well as from flat-file sources. Having a single user interface to work with all data sources saves time and ensures consistent and accurate data integration.

## EASY SETUP FOR EASY QUERY EDITING

“The learning curve for setting up Toad Data Point was mostly nonexistent,” Walker says. “Once we figured out the Oracle and Teradata drivers, the installation and deployment across the team was very easy.”

Team members were adept at writing SAS procedures and code, but they were less experienced with SQL code. They looked into trying various SQL developer tools, but Toad Data Point was the most user friendly. The visual query builder in Toad Data Point and the intuitive SQL editor made the transition easy.

In addition, the SAS environment required a dedicated server with heavy infrastructure requirements. Toad Data Point is a much leaner solution.

## SECURE DATA MANIPULATION

Using heterogeneous data sources can create data quality and security concerns. Toad Data Point makes it easy to work with and select specific data before creating a model that is deemed ready for analytics.

The group uses the Data Profiling feature to inspect data to assess its content and data quality. The feature also allows team members to find duplicates and nulls, identify anomalies and patterns, and view statistics about their data. Graphs and charts help visualize the data quality early on in the process.

Toad also allows the team to automate Excel Pivot Table reports for easy organization and summarization of data to create meaningful reports.

“And because we’re dealing with very sensitive information, such as customer credit scores and other confidential details, we need a secure system,” Walker says. “Confidential information is kept on Oracle in a highly secure environment. Toad Data Point allows us to authenticate at the source.”

“All in all, it’s a very easy-to-use, convenient tool for accessing multiple data sources,” Walker says.

## ABOUT QUEST

Quest helps our customers reduce tedious administration tasks so they can focus on the innovation necessary for their businesses to grow. Quest® solutions are scalable, affordable and simple-to-use, and they deliver unmatched efficiency and productivity. Combined with Quest’s invitation to the global community to be a part of its innovation, as well as our firm commitment to ensuring customer satisfaction, Quest will continue to accelerate the delivery of the most comprehensive solutions for Azure cloud management, SaaS, security, workforce mobility and data-driven insight.

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