

# SALES MI REPORTING TRANSFORMATION

Barclays Investment Bank

## OVERVIEW

### 1. Situation

- ✓ Barclays IB aimed to offshore the Sales MI reporting function to India to improve service levels and enhance efficiency within the organisation

### 2. Task

- ✓ As a Business Planning & Analytics specialist, I was responsible for mentoring the offshore team, developing reporting dashboards and providing analytical support to facilitate strategic decision-making

### 3. Actions

- ✓ 1. Team Mentoring:
  - Mentored and developed the offshore team, providing guidance and support to enhance service delivery and analytical capabilities
  - Conducted training sessions and workshops to equip team members with the necessary skills and knowledge for effective reporting and analysis
- 2. Dashboard development:
  - Guided and collaborated with the dashboard back-end developer to design and optimise reporting dashboards
  - Ensured that dashboards delivered actionable insights, facilitating data-driven decision-making for stakeholders
- 3. Strategic reporting:
  - Supported the Global Markets COO by providing strategic reports and analysis on the impact of regulatory changes on the client franchise
  - Delivered insights that informed strategic decision-making and helped identify opportunities for business growth

### 4. Results

- ✓ - Streamlined reporting operations by successfully off-shoring the Sales MI reporting function to India, improving efficiency and reducing costs
- Enhanced the service levels and analytical capabilities of the offshore team through effective mentoring and skills development initiatives
- Developed optimised reporting dashboards that provided actionable insights for stakeholders, facilitating automation and data-driven decision-making

- Supported strategic decision-making for the Global Markets COO by delivering timely and relevant reports and analysis on regulatory changes and their impact on the client franchise

## 5. Affected parties

- ✓ - Offshore Team members: Gained skills and knowledge through mentoring and training, enhancing their service delivery and analytical capabilities
- Global Markets COO: Benefited from strategic reports and insights that informed decision-making regarding regulatory changes and their implications for the client franchise
- Sales Global leaders: Experienced improved access to actionable insights through optimised reporting dashboards, enabling data-driven decision-making