

NexJ CDAi

Data Implementation Methodology



Building a Strong Foundation for Success

A sound implementation methodology serves as the foundation for the successful delivery of any software project. NexJ Customer Data Analytics & Intelligence (NexJ CDAi) is an analytics pre-processor that enables firms to increase the reliability and efficiency of analytics and AI initiatives, even when the data is inconsistent, siloed, unstructured, and changing continually.

NexJ's data implementation methodology enables firms to create a single, consistent, and complete view of the client, and use it many times across projects. NexJ follows a six-stage implementation methodology, illustrated below. The detail and duration of each step will be established with each implementation to ensure the right amount of delivery or training cycles are provided for project success. Training is delivered throughout the stages to drive user engagement, confidence, and adoption.

Define data attributes in a centralized catalogue

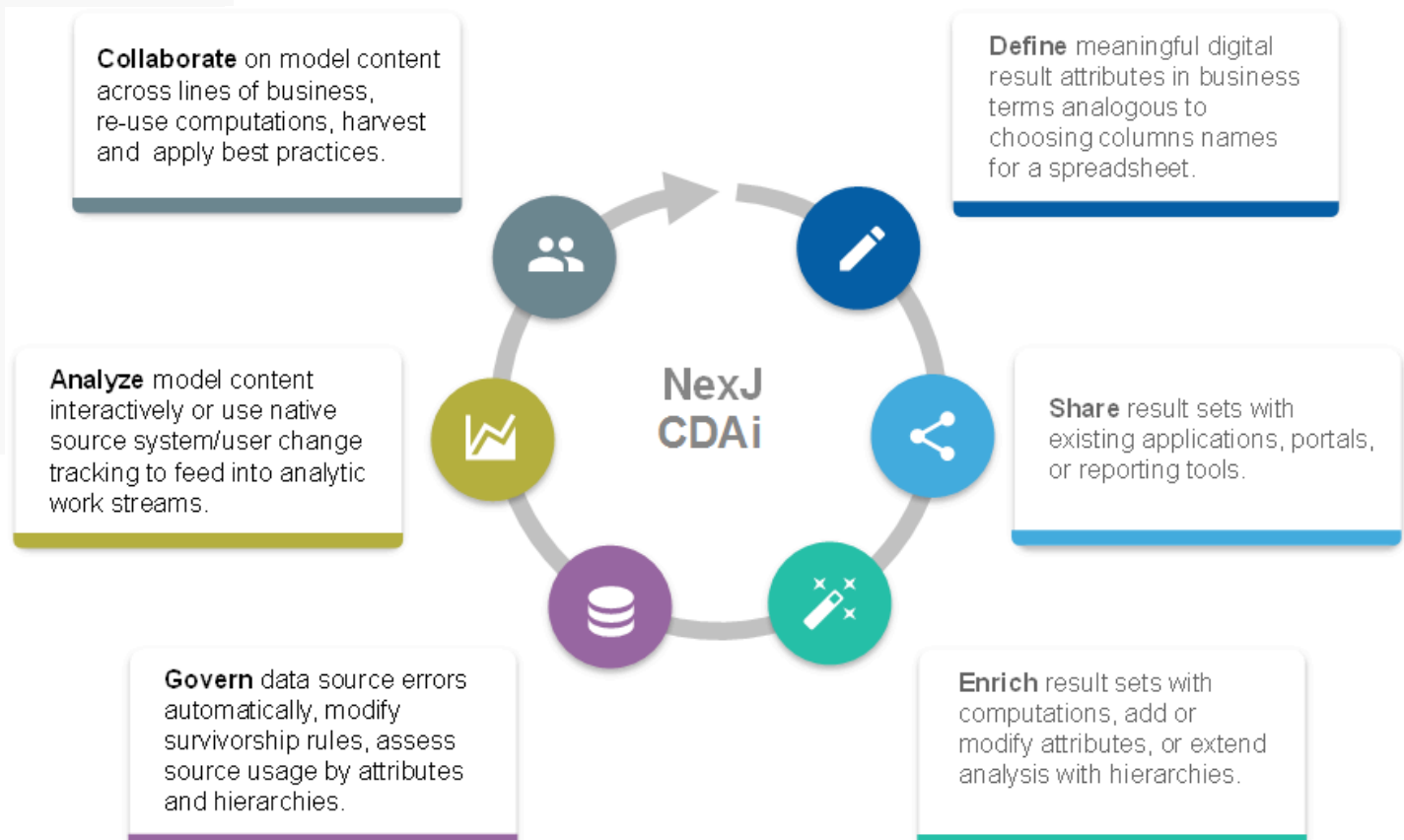
Share results with the application, channel, or analytics project that needs it

Enrich results with discoveries as they're made, modify or add attributes, and create new computation columns

Govern results by choosing the best corrective action for data errors immediately and updating actions as needed

Analyze data by delivering time serialized, historically accurate data to projects

Collaborate across teams by sharing result sets, findings, discoveries, and analytics results



Definition

The first step in successful data implementation is defining the desired result attributes. NexJ works closely with customers to understand what needs to be measured and how it fits into the evaluated process. Attribute names are catalogued in a spreadsheet, then mapped to the firm's source systems. NexJ CDAi uses defined attributes to ingest data from source systems, both cloud and on-premise, streaming and at rest, and automatically deliver up-to-date, appropriately provisioned client data to the application, channel, or analytics project that needs it.

Results Sharing

Access, visualize, report or share defined attribute results, even before all attributes are mapped, so data consumers can take advantage of discoveries that occur when visualizing or interacting with data. Results can be shared via URL for analysis with the reporting tool of choice or as a data feed into another application. Built-in change control ensures existing feeds continue to operate even when changes are made to the result set.

Results Enrichment

Enrich result sets with discoveries made to date, modify or add additional attributes, and create calculated columns to better use and make sense of data. Creating calculated columns is as simple as creating spreadsheet formulas, but some calculations may need a deeper technical understanding. Customers can use in-house technical support or engage NexJ or partner-affiliated professional service resources. NexJ CDAi automatically performs calculations and delivers current data to the appropriate application, channel, or analytics project. Results sharing and enrichment can continue to loop to make more discoveries from data.

Results Governance

Even small errors in source systems and data can become problematic. Govern results data at source by choosing the best corrective action for their needs and policies. This can range from correcting the system at source to maintaining the intermediate result and using a computed column to correct data. Any action taken can readily be changed in the future to address future requirements or policies.

Analytics

Deeper analytics often require historical content. Many models depend on time serialization. Results must therefore include dates of occurrence and changes must be tracked. NexJ CDAi provides this capability natively. Changes are tracked at the source system by the user and timestamped. Result sets can also be journaled to a big data store. In both cases, time serialized, historically accurate data is aligned with analytical models for seamless adaptive learning.

Collaboration

Collaborate by sharing result sets, findings, discoveries, and analytics results amongst teams. Work performed during the Definition, Governance, and Analytics stages is performed once. Centrally-defined catalogued attributes are available for access by any number of result sets. Teams can save time and improve consistency by sharing data, identifying processes that work well, and applying them across multiple teams.



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About NexJ Systems

NexJ Systems is a provider of Intelligent Customer Management software for the financial services industry. The Intelligent Customer Management suite is comprised of NexJ's award winning-products that use artificial intelligence to optimize customer management and increase advisor productivity, and cognitive applications that use machine learning to recommend the right actions to work smarter and faster.