

Financial

Case Study

# Data Governance and Cleansing





## Project Overview

Board Room Alpha (BRA) needed a reliable way to extract and standardize critical board member and executive data from thousands of SEC filings, which varied greatly in format and language due to differences in legal drafting. The inconsistency made it difficult to deliver accurate, timely insights for financial decision-making.

## Our solution

Previs developed a process to cleanse, normalize, and govern the data effectively. Our team mastered the nuances of financial and legal language, extracted key data points, and ensured accuracy through strict governance checks.

## Scope of work

Data extraction, cleansing, transformation, validation, and integration into BRA's cloud-based platform.

# Key Deliverables

- Extracted and standardized executive and board member data from thousands of SEC filings
- Applied data cleansing and governance rules to ensure consistency and near-perfect accuracy
- Integrated curated datasets into the BRA cloud platform for client access
- Delivered comprehensive coverage of metrics including ESG factors, executive turnover, resignations, and SEC investigations

## Technologies / Tools Used

- Custom data extraction and transformation scripts
- Grafana
- ETL transformation Tool

## Impact / Results

- Delivered a highly accurate, trusted dataset used by Wall Street firms for critical financial decisions.
- Enabled seamless client access to executive and governance insights through the BRA platform.
- Strengthened BRA's credibility with clients by ensuring reliable, consistent, and timely data.

T H A N K   Y O U



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