



Case Study: DecisivEdge Enhances Transactional Data Reporting for a Student Lender

OVERVIEW

A leading student lender was looking to improve the customer experience for partner school users. At the same time, DecisivEdge had an interest in developing this type of reporting solution that could be leveraged by other clients in the future.

To that end, the student lender partnered with DecisivEdge to modernize its reporting capabilities.

After much research, DecisivEdge concluded that implementing a no-code/low-code formula would be the best way forward: with regard to both flexibility, and cost-effectiveness.

We built that solution on top of Telerik, a superior reporting tool organization with a passion for creating customer-first solutions. Essentially, it replaced the student loan management company's legacy system with a modular, scalable framework that streamlined how users accessed, analyzed, and shared loan data.

The result? Improved user experience, better visibility into student loans and disbursements, and substantial cost savings.

CHALLENGE

There were two primary pain points that the legacy reporting system was creating:

1. Manual Reporting Frustrated Users: School users relied on a dated "Portfolio Summary" process that required manual Excel downloads. Reports were hard to interpret, time-consuming to extract, and not easily configurable for quick insights. For teams managing application statuses, disbursements, loan statuses, and refunds, this was a serious bottleneck.

2. Concerns Around Performance and Scalability: Because reports were generated directly from the transactional system, the company had valid concerns about performance slowdowns—especially when processing large data sets or running multiple concurrent reports. The lack of asynchronous report generation and performance monitoring features only amplified these issues.

SOLUTION

Why Telerik? A Strategic Evaluation.

DecisivEdge conducted a thorough evaluation of reporting tools, comparing Telerik and DevExpress against the existing reporting tool. Telerik emerged as the clear winner due to:

- *Superior tooling:* A modern drag-and-drop report designer that required little technical skill to operate
- *Better support:* A strong developer community and excellent vendor responsiveness
- *Lower cost:* A more affordable licensing model with generous distribution rights

This evaluation aligned with DecisivEdge's goal of delivering powerful but lightweight reporting across its client ecosystem.

A Modern, Modular Reporting Architecture

The team designed a reusable architecture that separated:

- *Report design:* What data is displayed using a no-code report building tool.
- *Report distribution:* When and to whom it's delivered (via secure email links).
- *Application integration:* How each report behaves within a client-specific system.

This modular approach meant that the same reporting engine could be plugged into other applications with minimal configuration, thereby future proofing the solution for broader rollout.

Feature-Rich, Secure, and User-Friendly

The new Telerik-based reporting system supports:

- *Four key report types:* Application Status, Disbursement Forecast, Loan Status, and Refunds
- *Custom filtering:* Users can filter by school, date range, status, and format
- *Flexible delivery modes:* Schedule recurring reports, run reports on-demand, or generate one-time reports instantly
- *Asynchronous processing:* Users are notified via WebSocket when a report is ready, allowing them to continue working while it runs
- *Secure access:* Reports are accessed via secure login to prevent unauthorized distribution

RESULTS

The impact of this reporting transformation has been immediate and measurable. What once took time and technical intervention is now streamlined, secure, and efficient. The feedback from school users and internal teams has been overwhelmingly positive.

- *Improved operational efficiency:* Schools now have instant access to up-to-date loan data without relying on IT or spreadsheets.
- *Faster response times:* Asynchronous report processing and performance monitoring ensure smooth operations.
- *Flexible report changes:* With a built-in no-code report editor, clients can modify existing reports or work with DecisivEdge to build new ones.

ABOUT DECISIVEDGE

DecisivEdge leads organizations through their transformation journey. We believe that the right mix of people, processes, and technology will drive modernization, business optimization and automation. To learn more, please visit our website at www.decisivedge.com, email us at getresults@decisivedge.com or contact us at 302.299.1570.