

# Case study – Financial Services Company



## Fit Assessment & Implementation

### Financial Services

#### Business Objective & Challenge

A major division of a very large financial services company provided an outsourced service for companies to administer their internal stock plans such as Employee Stock Purchase Plans, Stock Options, Restricted Stock Options, Grants and Vesting schedules etc. Reporting on these transactions was provided by a technology that was going obsolete. An enterprise wide decision was made to move all reporting to Oracle's Business Intelligence Enterprise Edition (OBIEE) and integrate this solution into their customer portal. This business division wanted to validate that both their existing and new requirements (which were gathered from a focus session with key customers) could be met with this new technology.

#### Collaborative Solution

Collaborative approached this problem from two perspectives

- Analyzed all the existing reporting and analytics produced to see what features and functionality was required from a new BI tool
- Based on the requirements gathered, knowledge of the BI marketplace and in order to gather requirements from a focus group of external customers, Collaborative mocked up in Excel a series of reports and dashboards, that showed proposed new features and functions from the system that followed a story book approach. These new features and functions were presented to the focus group and were extremely well received.

Collaborative then went onto perform a fit assessment to ensure that OBIEE could meet all the requirements. This initial phase was such a success that Collaborative was asked to convert all the reports and analytics over to a new OBIEE environment

#### Results

The fit assessment and proposed new functionality phase was so well received both internally and externally by the focus group that Collaborative was asked to implement the first and subsequent phases of the report and analytic conversion over to the new OBIEE platform.