Case Study: Technology Upgrade & Implementation

Global Financial Services Organization

Business Need:

CRM Process Improvement & Technology Upgrade, Project Management

Abstract:

Our client provides financial products and services to a variety of industries, with more than $12 billion in loans and financial instruments outstanding, they are recognized globally as one of the largest providers of distribution financing in the world.

Business Challenge & Client Vision

On the heels of a major financial system implementation, our client recognized an urgent need to upgrade its most critical CRM legacy system. At the initiation of the project, corporate IT leadership and management became concerned, because the project missed milestones and the prospect of significant additional investments in replacement technologies were professed as the only viable solution. Among it's challenges, the organization was hindered by resource constraints, a multitude of technology systems and disparate applications, a variety of ineffective business process and a time frame that demanded adherence to an aggressive schedule. Management requested our assistance in meeting the deadlines established by the parent company, its branch offices, and customers. Oculus Consulting Group was asked to organize and architect a project management process with business process improvements and analysis that would help the client realize their vision of rapid, significant and efficient completion of a CRM upgrade and implementation project within their technical shared services center.
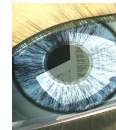
How Oculus Consulting Helped

Our engagement team was composed of project management experts with the multi-disciplinary background necessary to address project organization, administration, and business process issues across the entire technical spectrum of the organization. Our team evaluated key risk areas (technical infrastructure, process analysis prioritization, application testing and deployment implementation). Our experienced professionals identified risks and constraints that were generating problems with the company's existing approach, schedules and the way resources were deployed. From a technical perspective, our client demand the integration of applications ranging from ERP systems to leading-edge, remotely deployed web-based technologies.

Working with key users from critical business unit offices and shared service technologists, we revamped the project approach and developed project plans, standards, procedures and resource allocations associated with key business process risk areas. Consequently, our experienced professionals successfully positioned the project back on track. In addition, our project management experts performed ongoing project oversight and risk assessments that resulted in meeting project milestones and process improvements as scheduled and complying with complex financial service regulatory requirements.

The Measurable Reality

Oculus Consulting Group was instrumental in helping this client with the development and execution of its vision for accomplishing an upgraded CRM solution, from identifying critical processes and establishing project objectives, to monitoring project team accomplishment and redirecting efforts that were contrary to the original scope and vision of the organization.

Project team members were able to balance their team objectives with day-to-day responsibilities which saved the company considerable hours of anticipated outside assistance. In addition, a number of process enhancements were identified, implemented, or prioritized for further investigation and reengineering. These recommendations resulted in significant savings of staff effort, organization-wide process improvements, and totaled estimated cost savings of nearly $1 million in replacement technologies, infrastructure, and management expenses.

Oculus Consulting Group

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Another Example of Transforming an Organization's Vision into Measurable Reality!

To find out how Oculus Consulting can transform your vision into a measurable reality, please call 314.422.6365 or e-mail: oculus.consulting.group.llc@gmail.com.