

Cambridge Associates (CA) is a global investment firm. They aim to help endowments & foundations, pension plans, and private clients implement and manage custom investment portfolios to generate outperformance so they can maximize their impact on the world.

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CAMBRIDGE
ASSOCIATES

Financial Services
ERP & EPM Cloud

Business Challenge

- **Rigid Legacy Systems** - On-premise financial systems; planned in offline Excel models and disjointed Anaplan solution
- **Limited Integration & Automation** - Data integration between financial systems was labor-intensive with no drill-back visibility
- **Lacked Process Standardization** - Undocumented manual processes for outdated systems that was supported through tribal knowledge
- **Unreliable Data Hindered Effective Management** - Day-to-day risk management with error-prone spreadsheets ultimately hamstrung management's ability to make informed, value-add business decisions

Solutions

Oracle EPM Cloud - EPBCS & Financial Close Management

- **Revenue** - Custom calc & reporting model consisting of unique contract & asset considerations to forecast revenue by client
- **Financials** - Multi-year forecast solution for Expenses, leveraging trend & driver-based planning with allocation calculations configured
- **Workforce** - Utilized Out-of-Box functionality to plan multi-year existing & new hire employee salary, merit, taxes, & attrition, with additional custom headcount & compensation reporting for executive analysis views
- **Projects & Capital Assets** - Developed an IT project forecasting solution enabling the ability to manage financial, staffing, & funding needs for new & existing projects along with capitalization of projects & company assets

Oracle ERP Cloud - Financials, Projects, Procurement

- **Real-time Access with Full Transparency & Drill Down Capabilities** - Provide key management KPIs and analytics to enable users to manage by exception including project-level profitability
- **Improved accuracy of billing time and expense**

Impact

- **Standardized Processes** - End-to-end, documented & streamlined process that automates the data integration with ERP Cloud and calculation in EPBCS
- **Enhanced Analysis and Data Integrity** - Full transparency into key management KPIs & analytics to drive informed decision-making
- **Scalable Global Platform** - Supports global growth and local statutory reporting across 13 countries
- **Modern Cloud-based Future-Proof Platform** - Allows for growth, continued efficiencies, and on-going improvement