



The Future Shines Bright: Sun Life Financial Elevates its Planning Processes with Peloton Consulting Group and Oracle Cloud EPM

Sun Life Financial Inc. is a financial services company established in 1865 and headquartered in Toronto, Canada. The global firm operates in key markets worldwide, including North America, Asia, and Europe.



Business Challenges

With operations spanning North America, Asia, and Europe, Sun Life sought to modernize its planning and reporting processes to better support its global financial services business. The company faced significant challenges due to disconnected systems and manual workflows, which consumed valuable time and limited the ability to deliver prompt, strategic insights. By reducing reliance on on-premises support and adopting best practices, Sun Life aimed to enhance accuracy, increase operational efficiency, and automate key processes. This transformation freed up teams to focus on value-added analysis, ultimately strengthening decision-making and enabling the organization to operate with greater agility across its worldwide markets.

Approach

To address its challenges, Sun Life partnered with Peloton Consulting Group to implement a modern Oracle Cloud EPM solution designed to streamline planning processes, accelerate data delivery, and improve visibility across the enterprise. The new cloud-based platform enabled seamless integration of data from multiple Hyperion BSO and ASO applications, eliminating silos and supporting real-time insights. Key planning processes were refined, giving users greater control over metadata and data management. This refinement enhanced both accuracy and agility. Additionally, the IT Hyperion Center of Excellence team leveraged automation to orchestrate complex cross-pod and external processes, significantly reducing manual intervention and enabling a more efficient, connected planning cycle.

Business Impact

Sun Life significantly elevated its planning and reporting capabilities through the implementation of a driver-based model that freed up valuable time for deeper analysis and strategic decision-making. The streamlined solution increased adoption across departments by introducing more precise drivers and calculations, fostering greater accountability throughout the annual budgeting process. By minimizing manual steps and standardizing data inputs, calculations, and reporting, Sun Life gained a more efficient, accurate, and repeatable planning framework. The solution also enabled consistent management of global planning activities, establishing a unified approach across business units in APAC and North America. The global strengthening of collaboration, alignment, and operational performance positioned Sun Life for a very bright future.

Summary

To support its global operations and drive more strategic decision-making, Sun Life partnered with Peloton Consulting Group to transform its planning and reporting processes. Faced with disconnected systems, manual workflows, and limited time for analysis, the organization leveraged Peloton's approach of integrating people, processes, and technology. They implemented a modern Oracle Cloud EPM solution to streamline operations, automate complex processes, and unify data across systems. With improved user control, seamless data integration, and a standardized framework spanning multiple geographies, Sun Life gained greater agility, accuracy, and efficiency. The result was a more accountable, insight-driven planning environment. Teams can now focus on high-value activities and enabling consistent, repeatable success across the enterprise.



About Peloton Consulting Group

Peloton Consulting Group has the vision and connected global capabilities to help organizations envision, implement, and realize the benefits of digital transformation. Our team has the best practices, knowledge, industry expertise, and know-how. We make digital transformation a reality by leveraging Enterprise Performance Management (EPM), Enterprise Resource Planning (ERP), Supply Chain Management (SCM), Human Capital Management (HCM), Customer Experience (CX), Analytics, and Data Management for the cloud. Through connected capabilities, we bring people, processes, and technology together. We help organizations go further, faster. That is the Peloton way!