

Largest Implementation of Oracle HR Analytics In The World



client

Large Financial Services Company
in United States of America
270,000+ employees
70 million customers
\$1.4 trillion in assets

solution

Human Resource Analytics
Reduction in HR Spend
Increased Regulatory Requirements
40,000 users

technology

Oracle BI Enterprise Edition 11g
Oracle BI Applications
Oracle HR Analytics
Oracle Essbase
Peoplesoft
Oracle Database
Mainframe Applications

Using Oracle BI Applications To Reduce Overall HR Spend & Comply With Increased Regulatory Requirements

About the Financial Services Company

The company provides banking, insurance, investments, mortgage, and consumer and commercial finance through more than 9,000 stores and more than 12,000 ATMs and the Internet across North America and internationally.

One in three households in America do business with this elite financial services organization. Ranked as a top organization among all financial services companies in the world.

Business Drivers

Because of recent government regulatory pressures on the financial services industry, the CEO initiated a large cost reduction plan to create a leaner version of the financial services. This business intelligence initiative was a result of this cost management effort.

after infrastructure is human resources. The objective of the business intelligence initiative is to understand how the company can measure and reduce overall HR spending and address regulatory compliance for banking employees. Business drivers and technology drivers fell into 4 high-level categories:

1. A desired ability to perform HR analysis & measurement in multiple ways across the company.
2. Integration of a variety of disparate data sources & reporting/analysis tools was required. A number of disparate systems and data sources existed as a result of numerous acquisitions and mergers.
3. Visibility was needed into all large scale HR information, which has previously been impossible due to disparate tools and data sets as well as a number of differing data definitions preventing synergy.
4. Reduce the extensive amount of IT resource time spent towards answering business questions directed to HR consultants by line-of-business managers.

The company's second largest expense



“This is a 5-star app!”

- Financial Services Executive

Solution

This project was the largest implementation of Oracle Human Resource Analytics in the world. Executives aimed to bring the company's many distinct lines of business together into an enterprise reporting and analysis solution for human resources (HR). of information. This step in the university's technological evolution was an enhanced system for student curriculum analytics.

The company has grown via acquisition over the many years, resulting in various lines-of-business and geographic regions performing the HR function differently. One of the key aspects of the project was to gain a consensus amongst each of the 7 distinct groups (6 LOBs plus corporate HR). Ultimately, the project aimed to bring everyone in the organization together on a common reporting and analysis package to help enable a single, enterprise method of HR.

The final analytical application used a PeopleSoft source for the subject areas of Workforce Profile, Compensation, Retention, Hiring, Terminations, Promotions, Performance Management, Contingent Workforce and Recruiting.

A large team effort was required from a team that consisted of line-of-business management, Human Resources, the Metrics Team, and KPI Partners as the strategic consulting and systems implementation firm. Working closely with the Metrics Team, the entire project team worked to gain consensus on metric definitions, common dimensions, security model and ultimately the user interface and capabilities..

The final solution is an enterprise dashboard environment that provides extensive slice-and-dice options on key HR dimensions. For example, the Turnover Dashboard has filters for roughly 15 attributes (race, gender, title, manger, geography etc.), breakouts for some key dimensions (job class, job title, race, gender, etc.), plus different metric varieties (voluntary turnover, involuntary turnover). Each page allows for extensive drill down and navigations, with the endpoint frequently being a list of individuals requiring follow-up action for HR Consultants to act upon.

The project was delivered roughly 150 reports over 9 dashboards and 3 ad-hoc subject areas for power users. There is also integrated payroll data, the financial hierarchies, and a custom solution for training using the company's Learning Center.

With the implementation of Oracle BI Applications-HR Analytics, the financial services company now has all their human resource data together in one consolidated view for the first time in their corporate history.

Performance Challenges

Because of the grand scale of this effort, several notable challenges were encountered and overcome. A significant challenge was determining how to optimize performance levels when dealing with 300,000 active employees and a data history of several years. Considerations were made, and best practices were developed, for scalability, system upgrades, and performance.

“I’m blown away!!”

- Senior Human Resources
Technology Liaison

Large User Community

The user base for the application is a mind-numbing target of 40,000 managers. As part of a highly iterative process, a very large group of 90 internal business owners were interviewed to determine what each of the key business questions were for each of the primary HR analysis areas. After prioritization, solutions were initially prototyped in MS-Excel to showcase the visual solutions via reports and charts that would provide answers key business questions. The integrative prototyping process continued using Oracle BI, each time refining the structure, flow and look and feel. At the completion of the interactive sessions, not only did the large involved user community of 90 internal business owners have exactly what they wanted and could see it as it would appear in final form, but the Oracle BI development was essentially complete.

Customizations

The business required that users be provided the ability to view reporting hierarchies in a variety of formats. The company has multiple organizational hierarchies that include a combination of employee and position relation attributes. This required extensive customization to the Oracle BI Applications data model and code.

Users are now able to easily select whether they wanted to view reporting hierarchies by a combination Employee & Position based attributes or via older legacy hierarchy. For both of these organizational hierarchies, users can view them as they are today or as they were at any time in the past. The final deliverable is an application where each user can select one of four different physical hierarchies on which to report.

By Proxy Security Model

KPI Partners constructed a highly unique solution involving sophisticated Oracle BI configuration, a clean user experience and specialized back-end tables to enable all of the key functionality to establish a by-proxy security model.

Basic security requirements in Oracle BI Applications-HR Analytics limit any user to see only their direct and indirect staff. Because many of the power users of the company’s new HR Capital Analytics system are HR Consultants, enhanced functionality was necessary to enable users like these to see the data as if they were another user.

Users have a security prompt box on every page, where they can select which hierarchy and version they want, which user they wish to become. A user can make the proper necessary selections to become another user, such as the CEO or a Director in Retail Banking, to gain that employee’s visibility into the system. All of the tables and hierarchy levels are fully transparent to any user.

Integration

The corporate strategy contrives to integrate financial hierarchies from the financial general ledger to allow managers to see the financial hierarchy as they pay for resources as opposed to who reports to them. This type of integration also brings together HR analysis bridged with financial data derived from Hyperion Planning and Oracle Essbase for cross-functional HR & financial analysis.

Duration

The effort was launched with a KPI Partners Vision Workshop that brought together key stakeholders from Technology, Business Sponsors, functional & subject matter experts, and the business intelligence project team. After a 12-month project, the first application was deployed to users.



40,000 Users On A Single Enterprise HR Reporting Platform

The company immediately reaped the benefits of a massive 12-month deployment of BI Application across 6 lines-of-business that realized a positive user adoption rates within 1 week.

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Consolidation of Systems

HR systems were consolidated across 6 lines-of-business. Oracle BI is now the enterprise-reporting standard. The former enterprise HR reporting infrastructure has been retired.

User Community

The initial deployment of the application was rolled out to 1,000 standard users and 100 power users. The final user community is a target of 40,000 total users.

Increased Productivity

A significant reduction in the time spent by IT and HR Consultants collaborating on manual reporting requests has increased productivity. Some processes used to take up several days for each ad-hoc report. Executive leadership and HR professionals now have the visibility into trends and the ability to access point-in-time results quickly without any technical skills.

Reduced Reconciliation Time

The application has produced more consistent reporting and transparency into numbers. This has reduced the time spent on basic reconciliations. The robust business descriptions of HR-related data ensure that audiences understand information real-time. In some areas, report lead-time has been reduced from 3 days to approximately 5 seconds.

Was Oracle Chosen?

The financial services firm coveted a scalable enterprise-quality solution with a centralized model that could be shared across all business units in the future. The Oracle solution fulfilled this need. In addition, the company utilizes ERP applications that fall under the Oracle umbrella. The BI Council wanted to take advantage of the pre-built analytics available within Oracle's BI Applications.

Why Was KPI Partners Chosen?

After participating in many events within KPI's Monthly Webinar Series, representatives reached out to KPI Partners for advice on the company's pending HR Capital Analytics project and the potential of utilizing Oracle BI Applications.

As the most experienced systems implementation partner focused on Oracle BI & EPM, KPI partners was chosen because of their expertise within Oracle BI and related technology. KPI Partners has successfully implemented the most complex deployments of Oracle BI in the world and the project at this financial services firm would be ranked as the largest Oracle HR Analytics implementation ever.

KPI Partners also offered global delivery capabilities that leverage a blended-shore model with a combination of high-value on-site experts and lower cost offshore resources.