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Driving Better Workforce Planning To Achieve Accurate Budgeting with Zensar and Oracle

Case Study

An »RPG Company

Overview
Upgrades for a more accurate budgeting process

Our client, a New York-based analytics software company, wanted to implement workforce planning on top of its financial planning to achieve accurate budgeting for each employee and contractor while maintaining data sensitivity. However, it faced several challenges in the existing staff cost planning/forecasting process and wanted a partner that would provide significant process improvements.

Challenges
Inaccuracies and lack of options

The client faced numerous challenges. The existing staff cost planning process had inaccuracies in employee categorization, no provision for employee transfers and employee headcount, and a single bonus category. The HR department could not hide employee names for certain users as there was no such option.

Finding the right cross-section for each employee was becoming increasingly difficult. Finally, technical challenges, such as using REST API in an SSO-enabled environment and enabling complex cell-level security, made the project even more complicated.

Solution
Process improvements and new features

To address these challenges, the client implemented several process improvements. Employee IDs and names were loaded into separate cubes to ensure data security and prevent user exposure. Planning was done by employee ID, and the current year's salary was considered from HCM. The HCM salary information was converted from local currency to functional and reporting currency.

The functional currency data was copied from actual to budget for budget purposes. Merit increases were applied on particular months, and there were options to adjust the base salary every month. Different bonus types were added, and car allowances were planned using the direct input method.

The transfer-in and transfer-out options were added to the budget process, and all budgeting was done in functional currency. Integrations were built to reduce manual intervention, including employee details, annual salary, location, department, product, project, hire date, manager information, bonus details, allowance details, and FX rates.
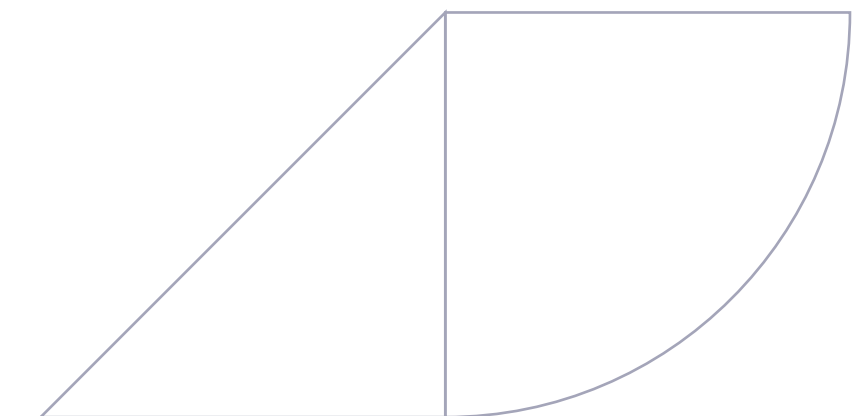
Impact
Efficient and effective workforce planning

The project delivered several benefits to the client, including user access through SSO, different security groups based on entity, region, and product, and different roles with varying security groups. With operations in 100+ countries, the client divided its employees by region to provide access.

Cell-level security, a new feature, was implemented to help provide access when standard security groups were insufficient. These improvements allowed the client to achieve its primary objective of creating a more accurate budgeting process integrated with the existing financial planning application while maintaining data sensitivity.

The new improvements addressed the client's existing staff cost planning/forecasting challenges, resulting in a more efficient and effective workforce planning process.

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