



keste Success Story

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HOULIHAN LOKEY

Customer Overview

Industry: Financial Services

Company Size: Enterprise

Product Leveraged

Oracle ERP Cloud

Oracle PPM Cloud

Oracle Integration Cloud

Salesforce Field Service Lightning

Tableau

Key Differentiator

Keste has a proven track record implementing custom, multi-cloud digital transformations.

Challenge

Multinational investment bank and financial services company was not able to scale due to limitations with their legacy systems. Key challenges included:

- On-premise legacy systems required substantial maintenance and limited ability to scale
- Disjointed enterprise resource planning (ERP) and Salesforce platforms resulted in erroneous and duplicate data and poor forecasting abilities
- Time consuming, manual processes to analyze opportunities and project financials
- Integration gaps between Salesforce CRM (customer relationship management) and custom expense systems resulted in errors

Solution

Keste is introducing a modern suite of cloud-based systems with automation capabilities to enable scale. Solutions include:

- Migrating on-premise systems (JD Edwards) to the Cloud for less maintenance and to improve scalability
- Integrating ERP, CRM and analytics systems to enable quick, accurate lead-to-cash processes, including invoicing and revenue recognition
- Implementing project portfolio management (PPM) functionality to enable cost and expenses to be available at the project-level
- Implementing Tableau to provide interactive data visualizations and dashboards to improve forecasting