

## Leading Real Estate Investment Firm adopts Oracle EPM Cloud Solution

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### Oracle EPM Go Live



AEW Capital Management | Boston, MA | [www.aew.com](http://www.aew.com)  
Industry: Financial Services - Real Estate Investments  
Products and Services Live: EPM Cloud  
Systems Replaced: Excel  
Integrations: Microsoft Great Plains & ADP  
Competition: Adaptive & Anaplan



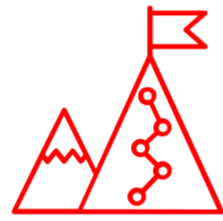
AEW Capital Management, L.P. is a company that provides real estate investment management services to investors worldwide. They have over 400 clients with \$78 billion in assets under management across all property types in North America, Europe, and Asia Pacific.

### Project Overview

AEW needed a fully integrated EPM system to eliminate their manually intensive Excel-based processes to improve efficiency and significantly reduce cycle time for planning and forecasting cycles. AEW also had a need to establish a central repository for plan, forecast, and actuals data to enhance planning and reporting.

In partnership with Peloton, AEW deployed a foundational Financial and Workforce Planning Model solution that consolidates plan inputs, provides detailed personnel planning, supports cost center & team expense planning, dynamic REIT Revenue modeling, and generates integrated financial statements.

### Business Challenges



AEW's continued growth, escalated the need to streamline their outdated planning processes. They lacked the reporting and analysis required to proactively manage their ever changing business needs. Their CFO had a vision to transform their Planning & Budgeting process to solve the following challenges:

- Manually intensive processes
- Risk of data inaccuracy
- REIT asset fees revenue modeling
- Lack of fully burdened P&L's
- Analysis of company capacity vs headcount

### Key Accomplishments

AEW experienced an overall shift of time spent on data collection, reconciliation, validation, and report production to developing analysis and insights for enhanced decision making. The Oracle Cloud Planning Cloud Solution for financials and workforce processes delivered several benefits including:

- System calculated REIT asset fees revenue modeling
- Shared Service fully burdened allocations for team and product
- Out-of-the-Box trend based expense calculations
- Detailed workforce planning
- Headcount capacity walk
- Automated integrations for data loads from source systems
- Centralized repository of budget, forecast, and actuals data
- Enhanced reporting and robust ad hoc analysis capabilities



### Why Peloton Consulting Group

**ORACLE** | Service Partner  
Expertise in  
Oracle EPM Enterprise Cloud  
in North America

Peloton Consulting Group had an opportunity to work with AEW through a two week Mobilization (assessment) process, which in turn built the confidence and trust within AEW's Finance and IT departments to engage Peloton in their Planning initiative. Peloton was able to provide both technical expertise and the Fit-to-Modern business transformation plan to help define AEW's new processes and achieve their long-term vision. Through Peloton's Fit-to-Modern approach and its Breakaway methodology, which applies continuous User Adoption throughout the project life cycle, the implementation of Oracle's EPM Cloud Planning - Financials & Workforce was successful and sets up AEW to build on future enhancements.

### Who to Contact



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