

Leading Private Insurance Broker expands with Oracle EPM Cloud

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EPIC Brokers | San Francisco, CA | www.epicbrokers.com

Industry: Insurance

Products and Services Live: EPM Cloud - Planning

Systems Replaced: Custom Planning

Integrations: ERP Cloud

Competition: Anaplan



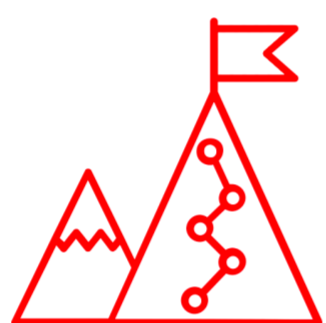
EPIC Brokers is one of the largest privately held U.S. Insurance brokerage and consulting firms with more than 53,000 clients. EPIC Consultants have a depth of industry expertise across key lines of insurance, including commercial property, employee benefits, unique specialty program insurance and private client services.

Project Overview

EPIC Brokers partnered with Peloton Consulting Group to implement Oracle EPM Cloud - Planning to support the consolidation of multiple planning applications used by their different divisions. The objective for consolidating these applications to one unified platform was to ensure they had standardized processes and consistent information across the entire organization.

Leveraging Peloton's Fit-to-Modern approach and Breakaway methodology, enabling continuous user adoption throughout the project lifecycle, EPIC is able to seamlessly integrate new acquisitions into their new Oracle EPM Cloud solution.

Business Challenges



EPIC Brokers continues to grow at a rapid pace which escalated their needs for a more scalable solution to support their business planning needs. The CFO and Finance Leaders were looking to transform their budget and forecast processes to address the following challenges:

- Disparate planning processes used by each division
- Inconsistent data definitions across the company
- Limited visibility to critical consolidated business data
- Manually intensive data gathering processes
- Slow Planning and Forecasting cycle times

Key Accomplishments

With Oracle EPM-Cloud Planning, EPIC aligned and standardized their disparate planning processes while also reducing the time spent on data collection, reconciliation, validation, and report production. The Oracle EPM Cloud Planning solution has provided the following benefits:

- Direct integration with Oracle ERP Cloud
- Enhanced reporting capabilities and standardized input templates supporting driver-based, trend-based and direct entry planning
- Allocations for P&L views
- Systematic calculation of compensation and benefit expenses
- Multi-scenario planning and versioning
- Automated data loads and application updates

Why Peloton Consulting Group

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

Peloton Consulting Group had implemented EPM Cloud - Planning and Financial Consolidation for Integro Insurance Brokers who was subsequently acquired by EPIC. Following the acquisition, Peloton was chosen to implement EPM Cloud - Planning for EPIC using Integro's application as the foundation. EPIC has continued to rely on Peloton to expand their EPM Cloud footprint as they acquire additional companies.

Who to Contact



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