



Cambridge Associates Drives Profitability with Peloton Consulting Group and Oracle Cloud ERP and EPM

Global investment firm Cambridge Associates (CA) aims to help endowments & foundations, pension plans, and private clients implement and manage custom investment portfolios to generate outperformance so they can maximize their impact on the world.



Business Challenges

As a world-class investment management firm, Cambridge Associates had outgrown the limits of its legacy on-premises financial systems. Built on proprietary, homegrown technology, the environment lacked standardization, modern integration, and reliable support. Critical financial planning and reporting processes lived largely in disconnected Excel models and a fragmented solution, creating a complex and fragile ecosystem.

Undocumented, manual workflows, maintained through tribal knowledge, introduced operational risk and inefficiency across the finance organization. With limited automation and no true drill-back visibility, data integration between systems was labor-intensive and error-prone. Day-to-day risk management depended on spreadsheets that undermined confidence in the numbers and ultimately restricted leadership's ability to make informed, value-add business decisions. Compounding these challenges, CA's evolving billing and revenue management requirements could no longer be supported by rigid legacy platforms.

Approach

To modernize its planning, forecasting, and financial operations, CA partnered with Peloton to implement Oracle Cloud EPM and Oracle Cloud ERP as a fully integrated, end-to-end solution. The Oracle Cloud EPM implementation included Enterprise Planning and Budgeting Cloud Service (EPBCS) and Financial Close Management to deliver connected, multi-year planning across the enterprise. Revenue forecasting was enabled through a custom calculation and reporting model designed specifically for CA's unique contract and asset structures. Financial planning was powered by trend- and driver-based forecasting with automated allocations. Workforce planning leveraged Oracle's out-of-the-box capabilities to forecast salaries, merit, taxes, and attrition, enhanced with executive-level headcount and compensation reporting. Project and capital asset planning provided full visibility into IT initiatives, staffing needs, funding requirements, and capitalization for both projects and enterprise assets.

Oracle Cloud ERP unified Financials, Projects, and Procurement, giving CA real-time access to billing, time, and expense data with complete transparency. Together, the integrated Oracle Cloud platform created a single system of record with full drill-down capabilities and management KPIs which enabled true exception-based management, including project-level profitability analysis.

Business Impact

The transformation delivered immediate and measurable value across CA's global organization. End-to-end financial and operational processes are now fully standardized, documented, and automated, dramatically improving efficiency and auditability. Automated data integration between Oracle Cloud ERP and Oracle Cloud EPM eliminated manual handoffs and significantly strengthened data integrity.

For the first time, CA's executive team has real-time access to detailed project performance, billing accuracy, and profitability metrics. These capabilities simply did not exist in the legacy environment. Enhanced analytics and transparent reporting now support faster, more confident decision-making across the business.

The new cloud-based platform scales effortlessly with CA's continued global growth, supporting local statutory reporting across 13 countries. With a modern, future-proof foundation in place, CA is positioned for ongoing innovation, continuous efficiency gains, and long-term operational resilience.

Summary

Cambridge Associates embarked on a complex business and technology transformation and needed a partner with the experience, industry insight, and collaborative mindset to guide the journey. CA chose Peloton for our ability to pair deep Oracle expertise with our proven Breakaway Methodology, driving not only system modernization but true process and organizational transformation. Together, we turned complexity into clarity and empowered CA to connect its business, modernize its financial and operational foundation, and enable accurate, scalable billing and revenue capture tailored to its unique business model. The result is a unified, global cloud platform that empowers CA with real-time insight, trusted data, and the agility to grow with confidence.



About Peloton Consulting Group

Peloton Consulting Group has the vision and connected global capabilities to help organizations envision, implement, and realize the benefits of digital transformation. Our team has the best practices, knowledge, industry expertise, and know-how. We make digital transformation a reality by leveraging Enterprise Performance Management (EPM), Enterprise Resource Planning (ERP), Supply Chain Management (SCM), Human Capital Management (HCM), Customer Experience (CX), Analytics, and Data Management for the cloud. Through connected capabilities, we bring people, processes, and technology together. We help organizations go further, faster. That is the Peloton way!