

Case Study

**Migration to  
Oracle SaaS ERP  
Applications and  
Digitize Financial  
Operations for  
Premium Broking  
and Wealth  
Management House**

# Client

The client is a premium broking and wealth management house.



# Challenges



Existing ERP has heavy customizations resulting in costlier upgrades and support.



Lack of digital features and integrated dashboards for real-time insights.



Contract with incumbent vendor was nearing completion, resulting in a very short window for an ERP application change in a Covid situation.



Need a partner with experience of BFS industry to deliver an integrated solution across Financials, Procurement, Payment gateways and revenue management systems.



# LTIMindtree Solution

- The project is delivered leveraging our xFH framework for effective remote working.

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- Cloud VisionNxt methodology fast-tracked the implementation in 16 weeks.

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- Implemented Oracle ERP Cloud (GL, AP, AR, Cash & Expense Management) modules across legal entities, integrating with several applications using Oracle Integration Cloud Service.

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- Delivered a custom solution for sub-broker payments

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- LTIMindtree Enclose framework with pre-configured modern best practice business processes helped in solution acceptance with minimal Business / IT intervention.

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- A touchless ERP experience is delivered with our one-click data migration tool and test automation platform.

# Business Benefits

The following benefits are expected over the next few years:

**30%**

**Savings** on TCO of application management.



Cohesive processes, unified data support for industry regulatory compliance.



Role-based information access for finance and management reporting.

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