



### CUSTOMER RESULTS

The Corporate Technologies team first developed an Oracle BI prototype to illustrate the concept and validate the technology. This was a critical checkpoint that secured senior management sponsorship. CTI then built a production class solution with OBI as a critical embedded foundation for the 401K dashboard.

## Case Study: Institutional 401K Dashboard

Client: A Global Financial Services Company

### SUMMARY

This firm, a household name in the retail financial services market, is also a major player in the institutional (i.e. retirement) market. Key to their reputation are innovative on-line tools serving the “plan administrator” at their institutional clients.

A major new capability (the “401K dashboard”) was developed to illustrate employee retirement investment behavior and, more significantly, benchmark this behavior against other peer level companies. In this way, the plan administrator gained valuable perspective as to how effective they are at cultivating good retirement practices across their employees.

Industry	Financial Services
Client	A Global firm providing investment products to retail and institutional clients
Problem	A major product enhancement envisioned a new dashboard to provide insight into institutional client employee investment behavior and to benchmark this behavior against other institutions. In this way, the plan administrator would develop a better sense of how effective they are performing against their peers and identify where improvements were possible.
Solution	<p>CTI provided pivotal influence and leadership in the solution. First, CTI was commissioned to build an Oracle BI prototype to benchmark against other competing technologies. The client decided to work with CTI based on our prototype Oracle BI was selected as the core technology.</p> <p>CTI was then commissioned to develop the major dashboard components addressing Savings, Asset Allocation, Participation Rates, Interactions, Guidance, and Loans. The project was progressing so well that CTI was asked to prepare and host a preview version at a major industry conference. The feedback was exceptional, and the project was further expanded.</p> <p>Finally, CTI architected the security framework for integrating the OBIEE solution with the business portal, including SSO for personalized data &amp; content security.</p>

Benefits	<p>The solution enabled the following benefits for our client:</p> <ul style="list-style-type: none"> <li>• New investment analysis and benchmarking capabilities</li> <li>• Personalized dashboard for managers, analysts, vendors and Clients</li> <li>• Oracle BI adopted as the external, client-facing dashboard platform</li> <li>• Seamless and secure integration with client's portal</li> <li>• Reduced IT costs</li> </ul>
Technologies	<p>Oracle Business Intelligence Enterprise Edition (OBIEE) Application portal integration via Java and Javascript Integrated Security / SSO</p>

## CONTACT US

We are a systems integrator and solutions provider located in Burlington, Massachusetts serving customers in New England, Metro New York, Atlanta and beyond.

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## ABOUT CORPORATE TECHNOLOGIES

CTI provides high value services to clients. Through the effective application of technologies like Business Intelligence, Data Integration and Management, Enterprise and Cloud Computing, we help clients implement the right IT solutions to empower business innovation and dynamic scalability. From leveraging business intelligence to rethinking the efficiency of the data center, we are your strategic partner for everything from data management to information delivery.

Today's IT solutions have to be highly integrated to solve the complex business challenges that organizations face. Your business cannot afford to work with multiple consulting organizations specializing in "silos of experience." Corporate Technologies' engineering team understands how the implementation of any new technology must support both the business and infrastructure requirements.