

CASE STUDY: FINANCIAL SERVICES

Modernize Siebel Application with Intelligent Adviser to help financial reps engage consumers

Business Overview

- One of the Largest Cooperative Financial Group in North America
- Over \$248.1 billion in total assets
- Large Oracle Siebel & OBIEE Install with “Surround with Cloud” strategy

Business Challenge

- Leveraging manual offline processes for needs assessment during acquisition and expansion of their consumers
- Moving from product centric approach to a lifecycle approach for how advisers engage with their consumers

Oracle Solution



- Integrate OPA Cloud with Siebel to allow financial advisers to prep and collect key needs information during one-on-one client meetings
- Allow advisers to promote products and services in real time
- Proposed business case of \$6.25 M of savings per year, or the ability to hold \$90K of additional meetings per year to equate to increased sales