



Consulting Services

Case Studies Whitepaper



We Offer Unique Business Solutions

The availability of data has never been greater than it is today but using data in way that solves day-to-day business problems has never been more difficult. Like the alchemist of old, the quest to turn lead into gold is similar to an organization's attempt at turning data into useful business information. For example, your business need may be to control corporate spending. The typical approach might be to provide endless lines of cost-center detail to the finance controller in the mistaken belief that he can control spending. We have a different approach. We would apply your established business rules and practices to refine that data into a comprehensive set of business graphs that act as a "dashboard" of distilled information. Provide these "dashboards" of actual vs. budgeted expense information to line-managers daily to empower those who really make the spending decisions. Our goal is to help you discover and access gold mines of information that will improve your company's ability to make sound day-to-day business decisions.

Information is your organization's most valuable asset. Let Software Forces help you utilize your business information systems to access and control your company data in a timely and intelligent manner. You have made substantial investments in your data systems; let's claim the return on that investment. The ability to quickly and accurately access your company data has never been more important than it is today.

Consulting That Makes a Difference

Software Forces' consultants bring people and information together. We are not afraid to "roll up our shirt sleeves" to understand your business by working with your company employees from developers to end users.

To make a difference to your business we will

- Listen to you to understand your business in order to pinpoint your specific business information needs
- Define the process of providing information to those in your organization who need it to solve specific business problems
- Understand where that data resides and produce a plan for gathering it
- Learn your business practices and procedures to define business rules that are applied to the collected data to produce refined data sets.
- Format your refined data sets in a way that makes it immediately useful to your employees. We can structure your data into intelligent, timely and useful information because we partner with you to understand your business needs
- Make your business information easy to understand and accessible to the right people, at the right time, for maximum productivity

Look at your business information in an innovative way. Partner with Software Forces and reach new levels of success by advancing your information technology and making it work for you.

Case Study Examples

The following case studies demonstrate Software Forces' ability to learn our clients' specific business information needs and respond to them in an exceptional and innovative way. See how we use our clients' business practices and procedures to design and deliver custom system solutions developed uniquely for them.



Case Study #1

Client

This client, a top investment bank, maintains a leadership position in trading, research, equity/fixed income sales, investment banking, private equity and private client services.

Client Business Need

The client needed the ability to share information across multiple global business units using a standard, quick and easy process. They also wanted to provide external clients and partners with on-line, real-time information in a secure environment.

The Challenge/Opportunity

Specific difficulties included writing and delivering reports across the global company. The technology groups were clashing with end users who needed to use company information in various ways but often disrupted the management of that information. In addition the desire to provide external clients and partners with information necessitated an increase in security to tie all global business units together safely.

The “business as usual” approach was not working. Each business unit had developed a “particular” way of writing and delivering reports, using many different applications and methods. This carried with it various vendor licensing procedures that made sharing information between global business units almost impossible. Managing disparate systems and applications within those systems was tedious, time consuming and costly. Writing a single report took days and delivery outside a specific business unit was difficult and rarely occurred.

This client had tried the “new software” approach without realizing any significant improvement or increase in productivity. Software Forces recognized that this client needed “business problem” solutions not “product-oriented” solutions. We saw many product islands but did not see these products working together to solve business problems.

Software Forces Solution

Software Forces:

- Instituted a single, web-based infrastructure to integrate global aspects of the company, allowing for enterprise information access
- Leveraged legacy systems and LDAP to offer integration of complex report writing and delivery. We enabled the client to manage people and resources easier, faster and with more security using a single sign-on portal tied to their own system
- Provided a single comprehensive reports-writing format
- Enhanced infrastructure to process reports on servers rather than individual desktop applications, allowing information to be shared between global business units quickly, accurately and securely
- Reduced report production and delivery turn-around time so significantly that dozens of new business units and hundreds of reports were quickly added for distribution and increased productivity. Routinely they now run thousands of reports a day
- Eliminated surplus software and the associated licensing hardships by introducing a single information management and delivery mechanism for the entire organization

Client Benefits

This client was delighted with the outcome of the project. By leveraging LDAP and the web, we provided them with a single sign-on portal to receive and distribute information globally while addressing all processing and security issues. All internal, external and partner access is available with increased security using this single sign-on portal. By working with Software Forces to understand and create unique solutions geared to their specific business requirements, the client was able to add functionality and produce an instant return on investment.

Key Technologies Utilized

JAVA (J2EE, EJB), COM/COM+, LDAP, DB2, ORACLE, SYBASE, SQL SERVER, TEXT, ACCESS, EXCEL, SINGLE SIGN-ON, PORTAL, PEOPLESOFT



Case Study #2

Client

This client, an investment advisory company with \$61.9 billion in assets, provides their clients with a broad range of investment products. They provide services and strategies using the highest caliber investment expertise, supported by outstanding personal service.

Client Business Need

This client wanted to deliver on a commitment made to their customers to provide on-line, secure, self-service access to specific and varied analytic account information.

The Challenge/Opportunity

Their “business as usual” process was time consuming and cumbersome. Customer reports took 2-3 days to complete and cost from \$400-\$600 each. Data from their legacy transactional system was extremely difficult to access as it was very susceptible to disruption. Once the data was located it had to be manually modified to produce a report that could be sent to the customer. There were clearance and security issues with allowing outside access to data and no way to make that data real time.

Software Forces Solution

Software Forces:

- Transformed a manual, single threaded reports system into an on-line, self-service, client based information server
- Designed a set of custom COM objects that made report writing possible by addressing the security problems inherent to the legacy transactional system that was in place
- Developed real-time, dynamic parameters to make selecting appropriate account information easy for the end user
- Provided customers anytime access to on-line, on-time, secure account information and analytic tools
- Developed custom function tools to address specific business needs such as calculating the last day of business in a report

Client Benefits

Partnering with Software Forces has allowed the client to deliver on a pressing commitment to provide secure, on-line, self-service account information to their customers. This higher level of service allows them to justify their fee schedules. The client was amazed at Software Forces’ ability to bring all the pieces together and to provide real business answers. Our solutions oriented approach provided a system that runs smoothly and elegantly to this day. This client sees us as a “business partner” not just another consulting firm.

Key Technologies Utilized

COM/COM+/MTS, XML, INFORMIX, SQL SERVER, TEXT, ACCESS, EXCEL, SINGLE SIGN-ON, PORTAL, SIEBEL



Case Study #3

Client

This client, with operating companies in over 50 countries, is the broker/dealer and investment advisor for a worldwide leader in financial protection and wealth management.

Client Business Need

The client needed to provide efficient, secure and immediate access to reports for their sales team managers and team members who worked in the field.

The Challenge/Opportunity

Using a legacy visual basic application that was individually installed on each laptop, the client found the process of requesting and sending reports a nightmare. The support and management of this application was difficult. Attempts to update each and every personal computer were problematic. To obtain reports the application required a connection to the system that was time consuming and slow to deliver. To query the system for information was a complex process. It was difficult for employees to receive accurate, useful information. These barriers created an atmosphere that drove most of the salespeople to operate without the critical information they needed to do their jobs. The system was just too frustrating to use.

Software Forces Solution

Software Forces:

- Instituted a web-based infrastructure for real time, on-line, secure access to reports
- Provided smart parameters to simplify complex look-ups from the field
- Modified existing reports structure to allow access to the right people at the right time
- Eliminated the individual application update and associated support problems with the introduction of an on-line, web-based infrastructure

Client Benefits

By partnering with Software Forces this client was able to provide immediate, accurate and secure report information to their mobile employees. This had an immediate, positive effect on the bottom line. The web-based system allows agents to easily monitor on-line individual and group statistics with real-time, accurate information, which has greatly improved their performance. Immediate report access has allowed the client to save time and money previously used for generating reports. After numerous experiences with consultants "wearing out their welcome", this client was appreciative of Software Forces' ability to quickly understand and solve business problems.

Key Technologies Utilized

COM/COM+/MTS, SQL SERVER, TEXT, ACCESS, EXCEL, SINGLE SIGN-ON, PORTAL, CALL CENTER INTEGRATION