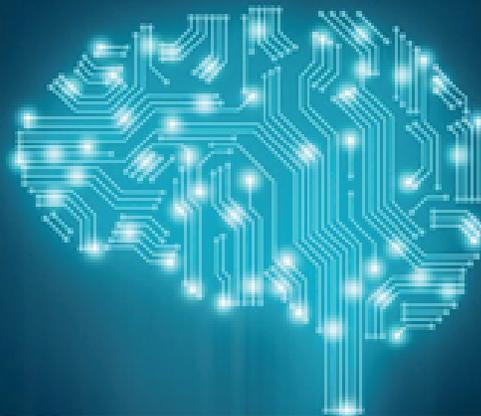


compose™



Case Study Investment Bank

Client secured their data by getting source information off of spreadsheets and they removed the risks of using a homegrown system without sacrificing any of the complexities of their program.

Challenge

A global investment bank was managing their compensation in a home-grown spreadsheet based system. The process of breaking down data to planners and then bringing it back together was proving to be error prone and cumbersome to manage. As a multi-national bank they were also experiencing issues filtering data in multiple currencies with multiple conversion schedules while managing deferral schedules and guarantees. Their sophisticated compensation program needed to stay in-tact while including top-down budgets, pools with varying restrictions, and flexible controls so managers could control the process and manage exceptions.

Decusoft identified the following initial implementation requirements:

- Data import structure to capture unique compensation elements for configured and flexible compensation statements;
- Ad-hoc reporting capabilities directly from the system;
- Create bi-directional feeds with client's Workday and payroll system to standardize data across the process;
- Methods to supply finance department with selected and formatted data on command;
- Multiple configured workflows and levels of entry and approval as per program;
- Supply complete audit trails for compliance and tracking capability.

Solution

The client chose to enlist COMPOSE to solve the problems they were having with their current set-up. COMPOSE had a proven ability to integrate with Workday and also offered the security of a consolidated data repository that could handle the complex program they had in place.

With **COMPOSE**, the client stood to benefit from:

- A centralized data source and planning tool that integrates with Workday data and their payroll system
- Confidence in accuracy provided in an easy to use and manage solution
- A dynamic and accurate audit trail that provides an assuring layer of protection for the firm and individual managers
- Secure web-based access for managers to provide speed and accountability
- A robust system of calculations to manage all currencies and budget configurations

Outcome

With COMPOSE handling all the elements of the client's cycles they were able to achieve multiple compensation efficiencies which greatly reduced the time spent in plan administration. They were able to eliminate compensation spreadsheets by migrating data from their home-grown system to have COMPOSE as a single repository and planning system. They also leveraged the integrated COMPOSE report designer to make numerous custom compensation reports

About

This global investment bank of over 1,500 employees focuses on wealth management, institutional asset management and private equity investing. They serve clients from offices in North America, Europe, South America and Asia. Over the last 20 years, the firm has advised on more than \$3 trillion of transactions.

COMPOSE by Decusoft powers your compensation planning, administration, and management with a secure, web-based centralized platform designed specifically for financial services professionals. In everything we do, from product design, service delivery and our product roadmap, the voice of financial services professionals is present.