



## IT Convergence Functional Education Helps Merrill Lynch Complete Oracle HR Implementation

### CUSTOMER PROFILE



**Merrill Lynch**  
New York, New York  
www.ml.com



### INDUSTRY

Banking & Financial Services

### EMPLOYEES

50,600

### IT CONVERGENCE SERVICES

▪ Education

### APPLICATIONS & TECHNOLOGIES

▪ Oracle Financials 11.5.9  
▪ Oracle Human Resources 11.5.9

### KEY BENEFITS

▪ Access to senior-level, multilingual instructors  
▪ Global resource availability  
▪ Customized training sessions

### A LOOK AT MERRILL LYNCH

Merrill Lynch is one of the world's leading financial management and advisory companies, with offices in 36 countries and total client assets of approximately \$1.6 trillion.

### THE CHALLENGE

Merrill Lynch had utilized PeopleSoft to manage its human resources function and Oracle Financials to manage other business processes. The company wanted to streamline its IT systems, so it decided to leverage the functionalities of Oracle HR to achieve cost-savings and ERP efficiency. After the implementation of Oracle HR and Self-Service, Merrill Lynch was unable to go-live because its employees needed instruction on the Oracle applications.

Merrill Lynch required training from functional instructors a few days prior to the go-live date, encompassing five human resources service centers located in five countries. Between seven and twenty-five employees required training in each location. In Tokyo, Merrill Lynch required a Japanese-speaking instructor. Brazil served as Merrill Lynch's training site for all of Latin America; however, while instruction there was given in English, the company needed an instructor able to answer questions in Spanish and Portuguese.

Merrill Lynch had high expectations after developing its own training materials and processes, and required a partner with experience providing global Oracle education services. Merrill Lynch's expectation was that training would result in a successful go-live spanning New Jersey, Brazil, London, Singapore and Tokyo.

### HIGH-LEVEL PROJECT GOALS

- Realize cost savings by using Oracle HR instead of PeopleSoft to implement human resources business process
- Support Oracle HR implementation through human resources employee training in each service center

### WHY IT CONVERGENCE?

Merrill Lynch was interested in IT Convergence's (ITC) ability to deploy senior-level Oracle instructors globally. Merrill Lynch believed that ITC – in contrast with other firms – offered better education services and thought ITC's education department was more fully developed. The company was also impressed with the engagement team presented by ITC and with each instructor's successes with past clients.

### ITC EDUCATION RESULTS IN HIGHER EFFICIENCY AND REDUCED COSTS AT MERRILL LYNCH

ITC's instructors impressed Merrill Lynch with a high level of expertise and knowledge which could be used to support a global migration to Oracle HR. A pre-training review of the company's Oracle test environment prompted concerns within ITC's team of instructors, so the team modified the Oracle test environment to ensure there were no delays with the go-live date.

Five one-week training sessions were completed simultaneously by ITC, and post-training



**Merrill Lynch**



support was provided in each of the locations. ITC's instructors made sure employees were comfortable with the Oracle HR system, assisted with individual problems, and provided pick-up training to help employees who may have missed a session. After participating in the one-week education sessions, employees were able to work with the new Oracle system with ease.

The senior-level ITC's instructors drew upon their expertise to ensure that Merrill Lynch employees were able to improve human resources business processes by taking full advantage of Oracle HR functionalities. For example, after employees had been acclimated to the new environment, ITC's instructors presented them with a viewlet portal created by Merrill Lynch, which allowed employees to quickly find answers to common questions. ITC's instructors trained employees to take full advantage of Oracle's date tracking functionalities, which allow users to pre-enter or retroactively enter new hires into Oracle HR as needed. Similarly, historical snapshots can be requested, giving users instant access to a wealth of information on current or past employees. The ITC's instructors rounded out their education sessions by showing employees how to use Oracle HR more efficiently through the use of shortcuts.

#### **MERRILL LYNCH IMPRESSED BY ITC'S ABILITY TO SIMULTANEOUSLY EDUCATE END USERS FROM FIVE REGIONS**

Merrill Lynch was very pleased with ITC's functional education sessions, and it was also pleased with the company's ability to simultaneously deliver these sessions successfully in five regions. Because of this successful education engagement, Merrill Lynch knows that ITC is a partner capable of supporting future Oracle implementation projects.