



OPTIMITY ADVISORS | SUCCESS STORY

THE CUSTOMER

Optimity Advisors

INDUSTRY

Consulting Firm

EMPLOYEES

Over 350+

GEOGRAPHY

Washington, D.C.

SOLUTION

FinancialForce HCM

“HRMS Solutions has domain expertise and a strong working knowledge of FinancialForce HCM, so they were able to provide valuable insight and articulate the capabilities and limitations of the application to us.”

Jessica Wilson • Director of Human Capital

HRMS SOLUTIONS HELPS OPTIMITY ADVISORS AUTOMATE HR MANAGEMENT TO ACCOMMODATE RAPID GROWTH

Optimity Advisors (Optimity) is a leading advisory firm that brings industry leaders and clients together to collaboratively create innovative solutions and deliver transformational results in rapidly changing industries. The fast growing firm focuses on strategy, operations and information technology transformation across the globe, with multiple locations throughout the United States, United Kingdom and Europe. Optimity advises clients on how to meet changing industry needs and become best-in-class—through a combination of business, people, process and technology innovation.

Headquartered in Washington, D.C., the firm has enjoyed whirlwind growth since its founding in 2009. With six locations in the U.S. and Europe, the firm’s workforce has grown nearly ten times since its inception. “We were a very small company six years ago. Today we have more than 350 people and are continuing to grow,” says Director of Human Capital, Jessica Wilson.

GLOBAL MANAGEMENT CONSULTING FIRM LEVERAGES FINANCIALFORCE HCM

Such rapid expansion put pressure on Wilson, who was stuck using time-intensive, manual processes for many important HR tasks. “We did much of our paperwork by collecting manual copies and then scanning images to store on a secure SharePoint site. Data wasn’t interactive, and I used a lot of Excel spreadsheets. The more we grew, the more we knew that was not a sustainable model.”

New technology was needed to automate important aspects of human capital management (HCM),

including benefits administration, and recruiting and talent management. Optimity Advisors chose FinancialForce Human Capital Management (HCM), a comprehensive workforce management solution built on the Salesforce Platform™.

The firm had experience with the Salesforce platform as it had already implemented FinancialForce Professional Services Automation (PSA) for their services business. Two years later, Optimity extended its commitment to the Salesforce platform and adopted FinancialForce across additional business areas. This included the introduction of FinancialForce HCM, moving the General Ledger (G/L) to FinancialForce, augmenting its Customer Relationship Management (CRM) capabilities in FinancialForce and building out FinancialForce Enterprise Resource Planning (ERP).

Wilson explained, “We made an executive decision to move forward with an all-encompassing, end-to-end solution using FinancialForce HCM. Because it is built on the Salesforce platform, it’s dynamic, so we can do a lot of things with the system. It’s highly configurable and has remarkable reporting and dashboard capabilities to help us track HR data for our company’s specific needs.”

HRMS SOLUTIONS PROVIDES IMPLEMENTATION KNOW-HOW

In addition to finding the right solution, Wilson wanted to find the right HCM services partner to help guide Optimity through a successful implementation. HRMS Solutions is an authorized and trusted

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Jessica Wilson  
Director of Human Capital

FinancialForce HCM partner, offering a full range of professional implementation and managed application services; including system configuration, data conversion, training, integration and designing reports, analytics and dashboards.

“HRMS Solutions has domain expertise and a strong working knowledge of FinancialForce HCM, so they were able to provide valuable insight and articulate the capabilities and limitations of the application to us. They helped us figure out how we were going to design, configure and use the system for our business needs today, as well as anticipate and prepare for our workforce related needs as we continue to accelerate our growth.”

**SOLID METHODOLOGY GUIDES SUCCESSFUL PROJECTS**

The HRMS Solutions team uses a proven methodology to plan FinancialForce HCM implementations. This methodology defines the project roadmap, scope of work and tasks to be completed, and it also helps mitigate risk while providing accountability.

“HRMS Solutions started the engagement with a comprehensive orientation of the system followed by a two-day blueprinting session. They went through every topic, so they could really understand our business and how we might want to leverage the capabilities of the system. That’s how they scope and deploy projects, and I thought the process was highly effective.”

**AN AGILE, PHASED IMPLEMENTATION HELPS REDUCE RISK AND ACHIEVE OBJECTIVES**

Working with HRMS Solutions, Wilson and the Optimity team defined their top priorities, which included rolling out FinancialForce HCM’s open enrollment functionality in just six weeks. Choosing an agile approach, HRMS Solutions broke deployment into two phases.

“HRMS Solutions met our tight deadline for implementing the first open enrollment, and they even managed through some of our own internal delays. Our benefit providers didn’t come back to us with rates until a week before we were going live. We had data in the system but we were waiting on rates. That got done over a weekend and HRMS Solutions made it work. Their project team was highly accommodating.”

**ENHANCED RECRUITING AND TALENT MANAGEMENT ENSURE A FUTURE OF SUCCESS**

Nothing is more important to a management consulting firm than recruiting, hiring and retaining brilliant professionals. Critical to the FinancialForce HCM

implementation is the deployment of Optimity’s new candidate recruiting portal, onboarding and off boarding capabilities, and the utilization of employee goals, skills and certifications tracking.

The manual process Wilson used prior to FinancialForce HCM made recruiting tasks difficult. “Being able to track candidates, communicate appropriately and make sure they’re not getting lost in the cycle is so important,” she explains. “With our new candidate portal, we’ll be able to do a lot more passive recruiting. It will help us become more proactive and not wait for people to apply to us.”

**HRMS SOLUTIONS PROVIDES COMBINATION OF HR BEST PRACTICES AND TECHNICAL EXPERTISE**

During each phase of the project, HRMS Solutions provided advice to help Wilson and others use FinancialForce HCM more efficiently and effectively. In addition to intensive onsite training, Wilson picks up other tips during weekly calls with her project manager.

“HRMS Solutions’ knowledge base is extraordinary. Our project manager is not just a project manager. She has done software development and worked as a practitioner in HR. She not only advises us about how we can use the system, but spends the time to show us. She’s also given us some good HR advice that is region-specific.”

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