

Pantheon

Results Of The First Project: IT Impact

The team at Pantheon has successfully replaced three out of four major use cases that had been deployed with legacy technology and is actively working on the fourth use case. The resourcing impact has been obvious.

Results Of The First Project: Business Impact

The IT team at Pantheon has been able to significantly reduce the amount of time it takes to complete the workflow and business rule portions of projects.

Approach and Discovery

The use cases for a new technology were clear from the beginning of the search. Pantheon needed a tool that could operate in a headless fashion - in other words it would let them use existing .NET forms - and a tool that could handle complex approval paths based upon the attributes of any given request. An example of this includes:

An application that triggers a daily process to produce a set of figures and email them to a third party after signoff had occurred in a document management system and certain transactions being entered into a 3rd party system.

About the Client

Pantheon is an investment management group focusing on private equity, infrastructure and real assets with 35 years of investment experience in private markets. They operate from offices in New York, San Francisco, London, Hong Kong, Seoul and Bogota, with representation in a number of other key markets. They employ approx. 220 staff, 70 of which are investment professionals.

3x

Increase in Development Efficiency for Workflows

Improved Support

Complex Workflow Projects

Reduced Reliance

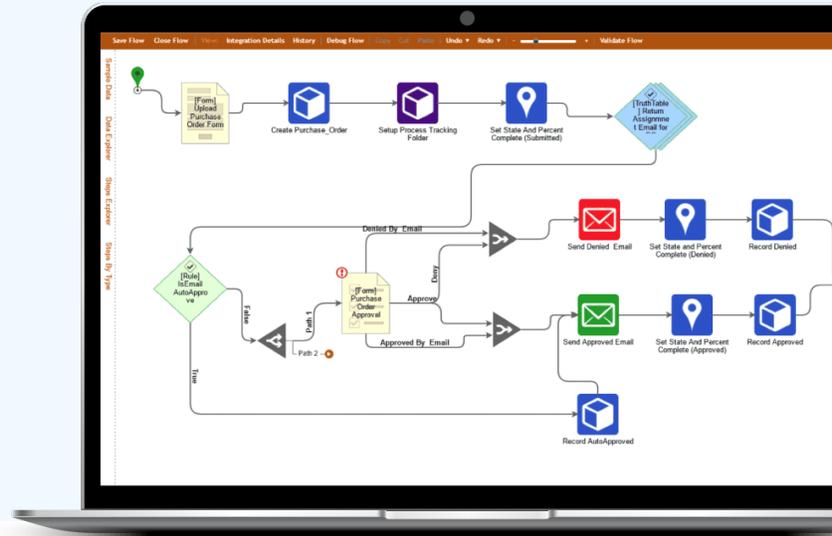
on Specialized Resources

We have worked with some of the largest software companies in the world, and with smaller vendors, but Decisions stands out above them all when it comes to the responsiveness and helpful nature of its support team.

Challenges with Legacy Solutions

The IT organization had been using a combination of similar or competing products to build solutions for the business that carried workflow and business rule level requirements. To leverage these technologies they'd contract with specialized developers who were familiar with these products. They found that they had put themselves in a situation where they were relying on a small population of developers who had quality experience with two different toolsets. Pantheon also discovered that some of the capability that new projects would need - especially complex approvals management that would leverage existing .NET applications - would be difficult to implement with previously used products.

Specifically, they 1) didn't want to expose end users to a myriad mashup of user interfaces from different tools and 2) needed an easier way to integrate with other internal and 3rd party systems outside of custom code.



Implementation

Pantheon identified one or two resources internally who could manage the workflow portion of any development efforts in collaboration with contractors they'd hire to complete the project. Projects with Decisions have ranged from as fast as a couple of days for some projects, to a number of weeks for other projects.

Evaluation

During the evaluation, the team at Pantheon experimented with several key capabilities within Decisions including:

- Monitoring FTP sites for new files.
- Parsing files to feed business rules data.
- Taking the results of business rule execution to trigger notifications in other systems.
- Requests and approval chains.

The team also reviewed the ability for any given .NET developer to learn the tool quickly and found that Decisions is an easier tool to pick up for the .NET developer without any experience in specialized tools than its competitors.

Future Efforts

A major eApprovals project is underway and the IT organization at Pantheon is discovering more ways to include Decisions in areas that are constantly changing as the business refines its requirements. When asked when they consider including Decisions in their projects, the IT organization recounted a circumstance where they thought they could build some simple workflow capability from scratch to satisfy certain business requirements, but later found that they should have built it in Decisions as requirements mushroomed.

DECISIONS

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