



Appian Customer Success Story

TPG Global Drives Digital Transformation with Appian and Bits In Glass

CHALLENGE:

Private equity deals are typically complex, are time-bound, have heavy regulatory and compliance requirements, and require several phases. TPG had determined it needed to modernize operations to build inter-operational efficiency to deliver improved value and speed to its private equity accounts.

After a lengthy research period over several months, the transformation team determined that a BPM software platform could provide a central point of reference, manage their complex workflows, and provide a 'one-stop-shop' for all of the business units required to consume agreements, documents, compliance, and Deals data.

Starting with the delivery lifecycle management processes, TPG set a goal to streamline their new deal entry processes, reduce complexity and make it easier for deals professionals to consume information.

TPG required accurate and complete information to onboard new deal cycles, as much of this data was located in multiple disconnected legacy systems resulting in

a confusion of manual processes and workarounds designed to access siloed data and documents. These were difficult for teams accessing data for deal compliance, documentation, accounting, expensing, meeting planning/scheduling, and audit history. Multiple business units required a single point of entry for the lifecycle of deals, meeting points, changes in valuations, and stakeholder updates.

The Deal Life Cycle (DLC) threshold, a point at which TPG identified that a new process needed to be started, required several integrations and workflow automation including compliance and auditability.

There were several challenges, one of which was that TPG wanted to avoid technical debt and it was important that the team become fully enabled. Price was a consideration as well, and to ensure they had no overlap with their existing tools. It was important that the new platform get uptake and engagement from employees and key business units and therefore had to be user-friendly and easy to onboard.

SOLUTIONS:

The client embarked on a digital transformation journey. Appian was chosen as the platform for change, and Bits In Glass was selected to provide IT integration and consulting services to:



Deals Life cycle, Part II

This project phase added enhancements to the original deal's entry determining the deal threshold project, notifications, communications, and hardening.

BIG added key project oversight and performed integrations necessary to TPG's billing system, document management system and employee directory. Allocations were a substantial, critical fundamental component that BIG developed. This component is very valuable and will be carried over to Project Code phases.



Project Codes

Billing allocations: This phase focuses on managing the billing allocations that feed information to the billing system, their expenses, and billing software. This project provides visibility to the data for key stakeholders who are able to access and consume this data in real-time.

Billing codes: The current project that the TPG team is working on with BIG is pulling all the project codes and assigning them to Entities in the billing system.

FOUR EXAMPLES OF BIG IMPACT



The BIG team built a reporting component that allows users to reorder, delete, export and sort report columns. This functionality greatly compliments Appian's reporting features.



The BIG team was critical in pulling extremely detailed information in a timely manner from the Appian logs. This required detailed knowledge of the Appian platform and a high level of dedication to the project to meet the deadlines.



The TPG team had an opportunity to give an impromptu demo of Appian's collaboration capabilities. With an extremely short timeline, in the middle of an ongoing sprint, one of the BIG developers built out functionality that provided an impactful, working environment for the users to utilize.



When a key plugin wasn't integrating as expected, the BIG consultants were able to reverse engineer the Java code to find the conflict, again going above and beyond typical coding.

RESULTS



Enhanced Employee Satisfaction

Over 500 users are now engaged with the Appian solution, reporting better access to real-time insights into the data and their processes.

Spin-Off Projects

TPG has several spin-off projects planned now that they have completed their first few projects. There is high potential for many new projects with the added capability and functionality that Appian brings.

Efficiency Improvements

Following the successful roll-out of the Deal Lifecycle project TPG is experiencing productivity improvements and increased efficiencies across the organization. The impact of the improved data access and usability is still being realized across various business units.

CLIENT TESTIMONIAL

Bits in Glass has been a critical partner in our Appian development journey. BIG takes our success seriously. Everyone that we have worked with at BIG has been exceptional.

They take the time to get to know us as a customer and make sure that we have clear, open lines of communication. They keep our projects on track by helping us commit to Agile best practices. BIG's developers work hard to understand our business and provide a solid product to our customers. They mentor our internal development resources and help us develop a strong

understanding of the power of the Appian platform. For larger challenges, our developers can engage BIG's wider network of technical/architectural resources or help us work with Appian support.



They are deeply invested in the success of our applications. With a large system in production, and more on the way, we are very pleased with our partnership with both Bits in Glass and Appian. Together, we have created a powerful combination to meet the needs of our business.



Melanie Emmel,
Director, TPG Global



CONTACT US

Join other leading organizations in making Bits In Glass a preferred partner.
sales@bitsinglass.com | 1-888-336-4484 | bitsinglass.com
  [bitsinglass](https://www.linkedin.com/company/bitsinglass)