

# Wunderlich Securities

Achieves Fast Time-to-Value with UltiPro Workplace



**Ultimate**  
SOFTWARE  
People first.

## Company Profile:

Established in 1996 in Memphis, Tennessee, Wunderlich Securities is a full-service brokerage firm that provides a comprehensive range of professional products and services to individual investors, corporations, and institutions.

With 24 offices across 14 states, the firm offers financial advisory, brokerage, equity research and investment banking services.

## The Challenges:

By using a payroll service bureau, Wunderlich Securities experienced a range of reporting troubles that extended beyond storing and accessing current and historical employee data.

Due to the payroll service bureau's limitations, the company's HR department had great difficulty manipulating critical information for executive and compliance reporting. In addition, errors were common because the HR team had to rely on spreadsheets and manual calculations.

## The Solution:

Since going live on UltiPro Workplace in May 2008, Wunderlich Securities has achieved a range of HCM improvements as well as increased the efficiency and strategic contributions of its HR team.

The UltiPro solution allows Wunderlich's HR associates to enter data one time, and this info is then populated across the solution for cohesive reporting—without manual data entry or reconciliation.

With streamlined reporting, Wunderlich's HR and payroll staff can get fast answers to a range of questions, such as how many employees were added by quarter for a specific division, and the HR team can analyze turnover by month, year, manager, or any other field in the system.

With UltiPro, Wunderlich's employees also can view and update their personal HR and payroll information, such as direct deposit choices or home addresses.

### The Customer

Wunderlich Securities

### Industry

Financial Services

### Number of Employees

450

### Key Benefits

- Easy-to-use reporting and analysis tools
- Workforce portal available 24-7 to managers and employees
- Responsive customer support from Ultimate Software

Employees can request vacation using built-in workflow that instantly routes the requests to the correct managers for review. Once approved, the information is automatically tracked in UltiPro.

“We are using the UltiPro portal to centralize HR information for our entire workforce, and we have even designed a specific area for new employees because we are growing so rapidly,” said Jenny Terjesen, PHR, human resources coordinator for Wunderlich Securities.

“It’s great for new employees to have a place to get answers to questions, find benefits details, or read the employee handbook—and it’s available from home or office 24-7. UltiPro is also very easy to configure. In a few weeks, we designed and deployed a tailored employee Web portal that addresses our company’s needs.”

UltiPro’s streamlined, comprehensive HCM solution is also providing the HR team with talent management tools to automate every aspect of the employee life cycle.

“When we looked for a new HR solution, we wanted more than access to our employee data. We needed online recruitment, performance management, and benefits management tools as well as advanced payroll capabilities that could handle our bonus program and integration with a number of third-party providers,” said Terjesen.

“Our UltiPro activation was out of this world, and UltiPro’s reporting has given our teams much easier and faster access to metrics we need to grow our bottom line.”

Beyond UltiPro’s end-to-end functionality, Terjesen has been particularly impressed with the level of Ultimate Software’s customer service.

“Ultimate Software’s customer support is exemplary,” said Terjesen. “When we have a question, it’s handled in a responsive, courteous, and efficient way. I really feel like they hear and care about what I have to say.”



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Jenny Terjesen  
Human Resources Coordinator  
Wunderlich Securities

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