

WEALTH MANAGEMENT

KNOW YOUR CUSTOMER

Company Background:

A wealth management company helping to simplify and strengthen the financial statuses of clients by offering wealth management, security, and banking services.

Team Lead: Head, PMO

Teams on Solution:

- PMO
- Marketing



NET PROMOTER SCORE

“The consultant was knowledgeable and helpful. We also completed our implementation knowing how to do everything on our own.”

Likelihood to Recommend: 9.

UNDERSTAND YOUR CUSTOMER

Current Challenges:

- Different systems and ways of working across teams in the organization calls for a need for consistency
- Limited visibility into project statuses
- Lack of reporting on risks and issues

GOALS/SUCCESS CRITERIA

- Consolidate project information within a single system
- Improve reporting on project statuses, risks, and issues
- Optimize approval processes
- Segregate the marketing team’s use of Workfront while maintaining the same PM principles

Get in touch with us to find out how we can take your teams to the next level today:



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