

Use Case Presentation

HOW WE ASSISTS
FINANCIAL INSTITUTIONS
DO THEIR BEST WORK WITH A
PROJECT MANAGEMENT (PM) TOOL

Use Case: Product Development Teams

GOALS AND CHALLENGES: WHY A PM SOLUTION IS NEEDED

- Using PM Tool as a way to manage workload as they scale
- Increase overall efficiency and streamline communication; manage and track recurring tasks
- Tracking the workflow of various repetitive and one off projects
- Want an online collaborative tool to manage projects and invite our clients to manage them with us, giving them full transparency and more opportunities to engage with us



Template Needs

PROCESS STEPS AND CAPABILITIES



FORM 5500 TEMPLATE: ANNUAL AUDITS

Annual return/report of
Employee benefit plan.

This template used to
manage the action items
needed before filing an
employee's benefit plan



VENTURE INITIATIVES

Venture team create
the idea for a project,
once approved, a plan is
put in motion.

Use Case Benefits

KEY POINTS

- Learn how to build an organized project plan in PM tool
- Delivery team members will develop, manage, and run projects efficiently and in the same manner
- Better prioritise tasks/projects to be more proactive, rather than reactive
- Ability to review the status of each outstanding task/project to better distribute work assignments among the Team

Measure of Success

- Returning 100% of client requests within their designated time span
- Improving delivery times by 30%
- With the reporting tools, we will be able to review the status of each outstanding task/project to better distribute work assignments among the Team

Product Development Teams

SAMPLE CUSTOMERS

SAMPLE #1

- Showcased how best to manage their project plans when they are ready to be created
- Workflow reports will be used to manage duration of statuses for project stages

SAMPLE #1

- Folders set up for Recurring tasks, Ad-Hoc tasks, and Prospecting
- Ad-Hoc task requests usually directed via emails now alleviated via Outlook add-in

SAMPLE #1

- Templates created for Annual audits
- Request Forms created for Lost Income calculations

SAMPLE #1

- Folder structure created for the different teams
- Appreciation of using a PM platform
- Having the team go through a basic overview of PM tool