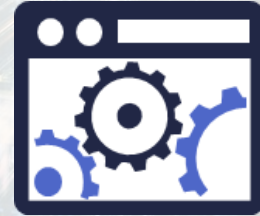


# Case Study:

## Internal Process Automation



**Large Investment Bank and Financial Institution Selects**

**RTD INSIGHTS  for Internal Process Automation**

### Company and Situation Overview

- Headquartered in Eastern U.S. with multiple locations across U.S.
- Large team across offices; recently launched new Midwest office
- New team members seeking assistance to set up processes & training

### Challenges without RTD Insights

- X No CRM / relationship management software platform available to be used in daily workflows
- X Limited existing dashboards and tools implemented to track and monitor team and individual performance
- X Disparate training platform and resources across bank for employees

### Results with RTD Insights

- ✓ Worked closely with two leading partners of newly launched office to create and implement numerous internal dashboards and performance monitoring
- ✓ Crafted and implemented detailed training modules for all employees
- ✓ Project-managed CRM implementation across the organization