Clarizen for Financial Services

Financial services companies are under constant pressure to manage shareholder returns and invest for the future—all with less budget and fewer resources. While this may seem like a no-win scenario to some, smart institutions are taking steps to face these challenges and deliver even more services and customer satisfaction.

Daily challenges

Many organizations are discovering that a traditional work management infrastructure (often comprised of little more than email and spreadsheets) cannot keep pace with institutional demand. Legacy systems and manual processes impede them from effectively linking their people, processes, policies and protocols so things move efficiently and quickly. In the face of constant regulatory demand, they need to swiftly modify processes and procedures to comply with changing requirements. Meeting these burdens can spread resources dangerously thin, making it more important than ever to build efficient teams, track resources and make the most of existing staff.

Typically, success is undermined by a systematic lack of resource utilization, visibility, automation and portfolio management.

A lack of resource utilization and the inability to balance on-hand resources with a never-ending flow of demand, leading to having too many people on the bench, or not having enough capacity on-hand to support project needs.

A lack of automated processes, which means your staff is likely spending too much time on administrative tasks and to keep up with regulatory requirements instead of working on planning initiatives, maintaining portfolio health and moving projects forward.

A lack of portfolio management, which results in risks to overall portfolio health and portfolio management as decision-makers must rely on best guesses vs. actionable data when making organizational investments in technology, resources, training, and so on.

Enter Clarizen

From managing and prioritizing resources, to gaining visibility into budgets, Clarizen gives you real-time updates, insights and collaboration across your projects and teams. That's why industry-leading companies — from Deloitte to Cisco Capital, rely on Clarizen to deliver real business results.

THE BREAKDOWN

Today's projects and portfolios are difficult to manage, plagued by issues that include:

- ⊗ Inefficient resource utilization
- ⊗ Poor visibility
- ⊗ Manual, slow process changes

Solution:
Overcome these obstacles, manage work and collaborate across the enterprise — all from Clarizen's single, intuitive cloud-based solution.

✓ **Powerful portfolio management**
Prioritize portfolios and get complete control over projects and resources.

✓ **Complete visibility**
Generate real-time visibility into budgets and costs so you can "do more with less".

✓ **Nimble change management**
Swiftly modify processes and procedures to comply with changing regulations.

These companies are "doing more with less" by quickly modifying processes and meeting compliance rules and optimizing resources to efficiently build teams. They are also tracking resources and assigning staff to streamline spending and reduce costs. What's more, they are using Clarizen to stay connected with their customers and provide them with seamless communication and an enhanced user experience.

Clarizen helps to close the gap that separates strategic decisions from project execution and extends the value and influence organizations beyond day-to-day project and portfolio management.

Align business objectives and quickly respond to change and ad hoc requests and get the visibility you need to make more informed resource decisions. Ensure the right resources with the right skills are available and planned for well before the panic button gets pushed.

Learn how Clarizen's collaborative work management solution can help you. **Sign up for an introductory webinar today.**

Built to enable financial services project success

Key advantages

Resource utilization

Clarizen delivers real-time insights into all your available resources, projects, and budgets and allows you to easily run hypothetical scenarios given different priorities and budgets. You can also view the resources that would be affected by the different scenarios before you implement the go forward plan.

Full visibility

Clarizen automatically centralizes, organizes and contextualizes all data and activities, and links them with the appropriate project or change request. As such, financial teams enjoy unprecedented 360-degree real-time visibility into the project pipeline, and use this insight to effectively and consistently prioritize projects and change requests.

Effective communication

Instead of working in silos and on islands, Clarizen brings project team members together so they can collaborate, brainstorm, strategize and succeed. The result is a dramatic reduction in status meetings, resolution times, cost and schedule overruns and unhappy customers.

Accurate data capturing

Clarizen accurately captures and tracks all project data in real-time, including effort, status, issues, and change requests—which automatically includes all pertinent details, such as the name of the person/customer who requested the change, description, priority and timeframe, along with relevant discussion posts and attachments.
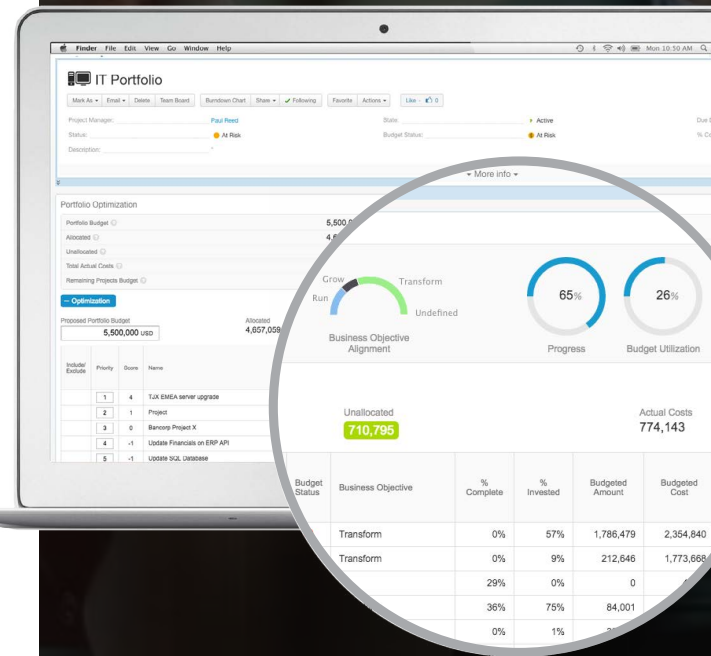
Powerful portfolio management

Clarizen delivers total transparency into the complete lifecycle and all conversations, approvals, files, and related work. Bring a new level of control and visibility to your portfolio management. Align investments with organizational priorities, create consistent processes and standards, proactively identify trends, threats and opportunities and are effectively manage change at every stage of the lifecycle.

Bottom line:

There's no such thing as an easy financial services project. Rather, there are just degrees of complexity, difficulty and risk. However, the fact that financial projects are challenging doesn't mean that project management success should be the exception, rather than the norm.

Deloitte, Cisco Capital and Pacific Western Bank all rely on Clarizen as the backbone of their project and portfolio management solution. Discover how high levels customer satisfaction, project success and portfolio ROI are possible with a modern project management solution.

ABOUT CLARIZEN

Clarizen delivers secure, cloud-based collaborative work management solutions built on the vision of business agility. Clarizen combines cross-company project management with configurable workflow automation to power the agile enterprise.

Visit us today at www.clarizen.com