

Model Bank 2018 Nomination Worksheet

AWARD CATEGORY

Please select the one category which is the best fit for your initiative. Celent reserves the right to re-assign the initiative to a different category.

- **Customer Experience:** Initiatives aimed at improving customer experience, across all channels (digital and physical), for retail and corporate customers.
- **Emerging Innovation:** Improving capability to innovate and experimenting with new technologies
- **Legacy Transformation:** Large scale transformation of legacy platforms
- **Operations and Risk:** Initiatives aimed at improving internal efficiency and risk management
- **Products:** New products for retail and corporate customers or significant improvements to existing ones

TITLE OF INITIATIVE

FINANCIAL INSTITUTION (FI) INFORMATION

FI Name *

FI Contact Name*

FI Contact Position*

FI Contact Email*

FI Contact Phone*

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DETAILS

Elevator pitch

A brief summary of the initiative and key points on why you think it deserves a Model Wealth Manager Award in your chosen category.

Project background and rationale

Describe the business need for the initiative. What problems were being experienced? What were the drivers and targets or desired outcomes? Who was the Executive Sponsor?

Detailed description of the initiative

What solution did you design to achieve the desired outcomes? What technology did you use? What process or organisational changes did you implement?

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Delivery team

Internal team: size of the core team, key departments involved; External resources: technology vendors, professional services firms, Fintech partners.

Timelines

Approximate project duration; go-live date

Quantitative success metrics

Firm revenue or productivity enhancement, cost reduction, end user feedback, social media buzz, etc.

Qualitative business benefits

Other business benefits that might be too hard to quantify.

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Innovation

What was particularly innovative about your initiative, e.g. new technology, ways of using it, approach, etc.?

Technology or implementation excellence

How complex was the project? What were the biggest challenges and how did you overcome those?

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ADDITIONAL MATERIAL

- Upload file(s)

SOLUTION PARTNER (VENDOR/ CONSULTANCY/ IT SERVICES/ BUSINESS PROCESS SERVICES) (OPTIONAL)

This optional section includes information on the partner(s) who played a key role in developing/implementing the initiative.

Firm Name(s)

Contact Name(s)

Contact Position(s)

Contact Email(s)

Contact Phone(s)

- I confirm that I have read and understand the Model Bank Award Winners Privileges and Responsibilities