

## 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\*

---

# Model Bank 2018 Nomination Worksheet

## 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?

---

---

---

---

# Model Bank 2018 Nomination Worksheet

**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.

---

---

---

---

# Model Bank 2018 Nomination Worksheet

**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?

---

---

---

---

# Model Bank 2018 Nomination Worksheet

## **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