



**isolution**

FINANCIAL  
CASE STUDY





# OUR CLIENT

One of the biggest, and most modern financial companies on the Polish market, with **130 branches** across Poland and a sales team consisting of **over 700 sales agents**.

The company cooperates with many banks and partners, including:

mBank

PKO BP

Getin Noble Bank

Raiffeisen-Polbank

Alior Bank

Deutsche Bank

ING

Euro Bank

FM Bank PBP SA





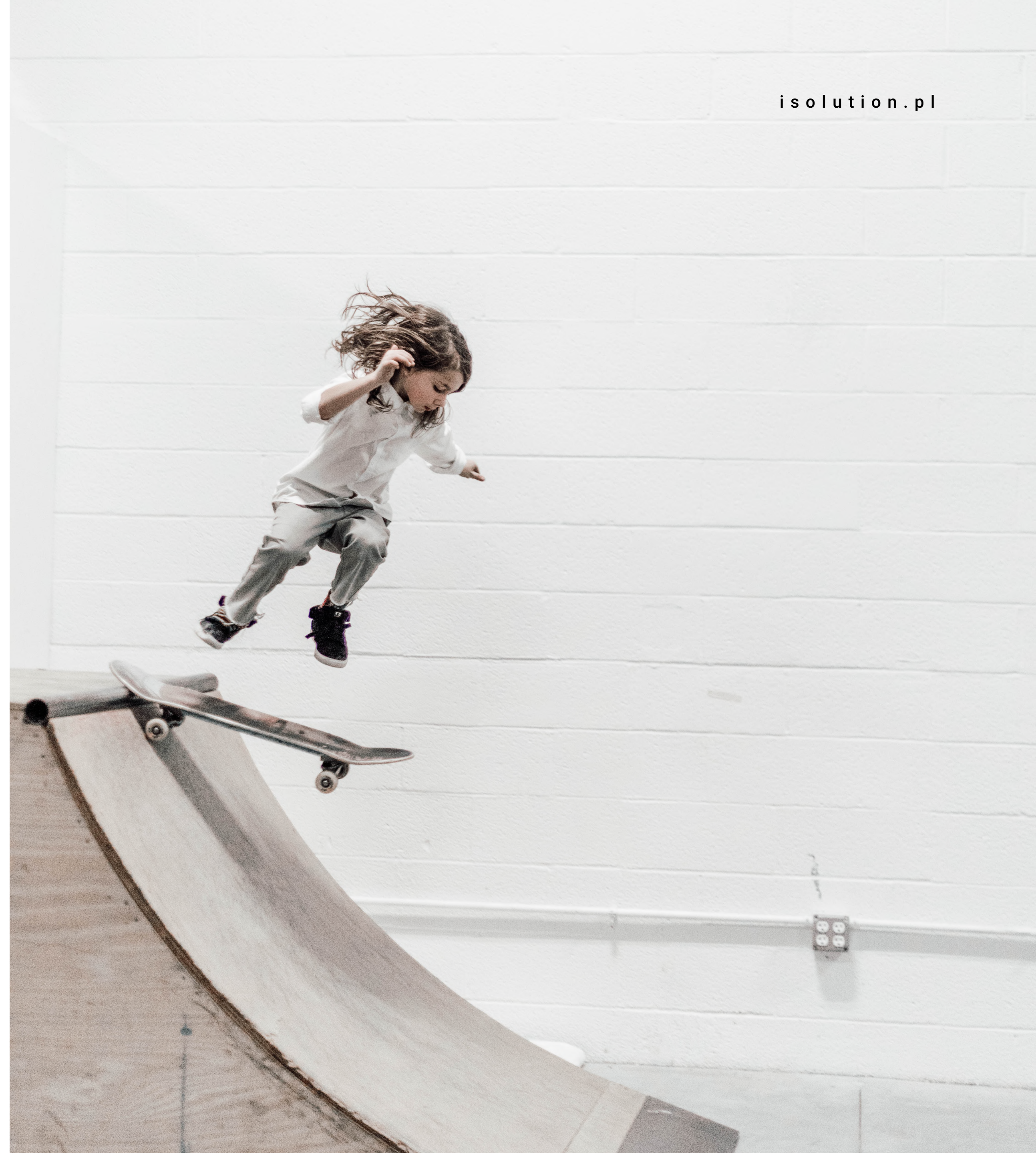
# EARLY CHALLENGES





# CHALLENGES

- Creating a vision of corporate architecture and the development of our client's business.
- Taking over the register system.  
Defining the current state,  
its stabilization and development.





DURING THE  
DEVELOPMENT  
PROCESS,  
WE FURTHER  
IDENTIFIED OUR  
CLIENT'S BUSINESS  
NEEDS...





# CHALLENGES

In parallel with increasing needs, we have been and are continuously building new systems that support our client's business operations.







# SOLUTION

The main systems developed and implemented in recent years:

## 01 Register

The main sales system of the organization, dedicated to the sale of its financial products.

### Most important functionalities:

- CRM
- lead management
- handling the implementation and processing of sales
- requests
- plan implementation support
- reporting module
- planning module
- implementation of training module
- gamification module
- the system is dedicated not only to the sales team, but also to the managers and employees of the headquarter supporting the activities of the sales network



# SOLUTION

The main systems developed and implemented in recent years:

## 02 Structure

The source system for the entire IT architecture in the organization.

### Most important functionalities:

- storing and managing of the current staff and their current geographical distribution in the area of the organization
- managing the recruitment process, personnel service, equipment demand, promotion and relocation process in the organization
- generating any form of documentation with the use of data collected in the system without the need to engage IT services in the process (based on Merge Fields)
- a training module that enables ongoing verification of the process of implementing new people into the organization, provides candidates with full knowledge about the company and its products
- a system permissions module that allows you to define, assign and send out appropriate permissions to your employees





# SOLUTION

The main systems developed and implemented in recent years:

## 03 Sales

Cross-sell sales system and after-sales support.

- viewing current sales status along with data from various sales sources (multi-source)
- cataloging of sales in relation to the source and type of the product being sold together with the definition of aftersales activities for the selected category.

## 04 Knowledge base

A repository of knowledge and company's internal materials.

**Most important functionalities:**

- storing, cataloging and exchanging correspondence inside the company in the area of sales knowledge
- creating sets of macros, thanks to which the formatting of a website's appearance remains entirely in the sphere of a business's competency without the need to engage IT services in the process.





# SOLUTION

The main systems developed and implemented in recent years:

## 05 BI

A system used to report data collected in the organization. Thanks to the use of a data bus with constant (current data) access to sales data, employee data or data on the current activities of employees in such systems as Sale.

### Most important functionalities:

- creating predefined reports presented online on a dedicated website or embedded in systems or analytical OLAP cubes to which the user gains access through Microsoft Excel or any other BI environment that allows the use of data cubes.



WE STARTED WITH  
A 3-PERSON TEAM  
AND SEVERAL  
ENVIRONMENTS.  
OVER TIME, AS OUR  
CLIENT'S BUSINESS  
NEEDS GREW SO DID  
OUR TEAM

AT THE MOMENT, WE  
COUNT 26 PEOPLE  
WORKING WITH OVER  
100 PRODUCTION AND  
TEST ENVIROMENTS

HOW DID WE DO IT?





# TRUST

Thanks to the trust that the client gives us, we have:

- a positive impact on the work model
- the choice of technology

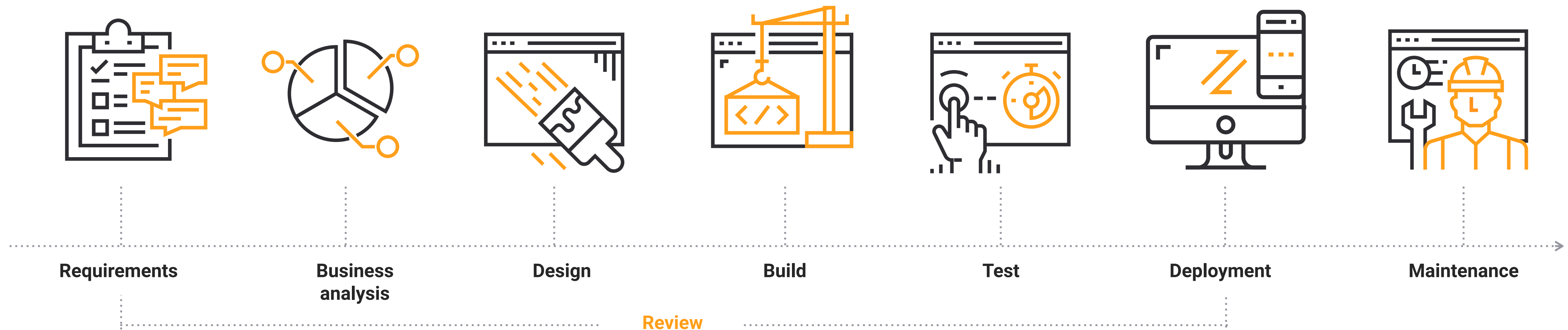
In addition, thanks to a large knowledge of our client's needs, we can propose new solutions that boost mutual development.







# OUR METHODOLOGY



We work based on the best practices. We believe in the **Agile manifesto**.

In the manufacturing process, we use a **lean approach based on KANBAN**. As a result, we can provide business value to the client and focus on improving work organization and workflow.

The settlement is based on the Time and Material method. The client pays for the work that has actually been completed. The project is systematically presented to the client, which allows him to make quick decisions regarding development.



WHY IS  
WORKING  
WITH US  
WORTH IT?





# SHARED VALUES

We could write an essay about our **knowledge and experience**, but we believe that **something more is needed for good cooperation - shared values.**

During the project, described in this presentation, we have proved that it is **possible to cooperate with the client on a partnership basis.**

The fruit of this approach is **growth; both ours and our client's.**









## THE NEXT 2 YEARS

In cooperation with the client, a roadmap was drawn up for at least the next two years.

We are currently implementing one of the most important business processes of our client, consisting of servicing the full cooperation process with agents offering the client's products.

As part of this project, we are transferring the entire recruitment process to the Structure system. We are also developing a competition platform and a warehouse management service module. In addition, we are organizing and standardizing all product dictionaries by combining them into one Catalog of products.

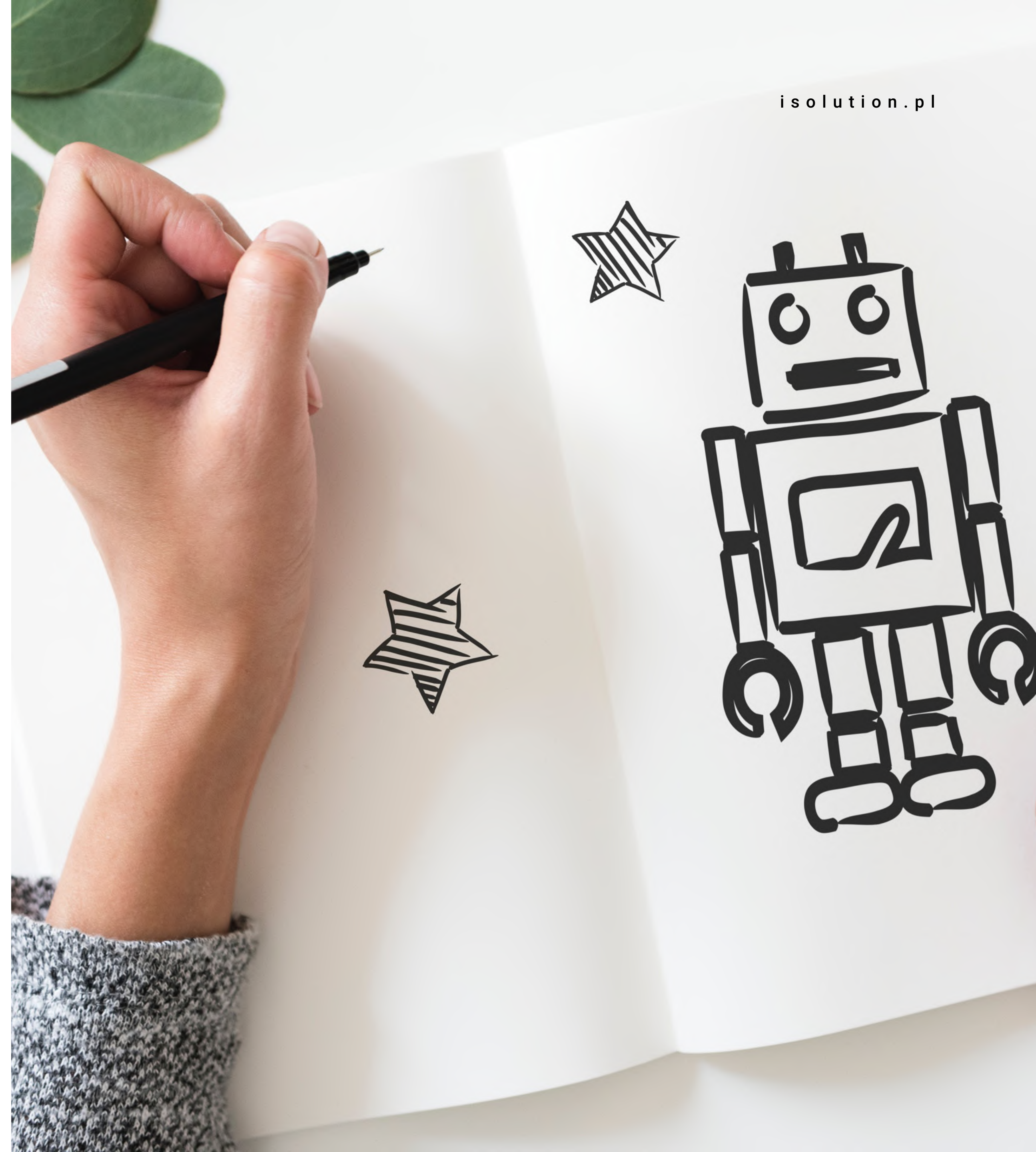




# ARTIFICIAL INTELLIGENCE

We are also implementing projects of AI

- 1** The goal of the project is to aggregate and analyze sales data.  
Through the use of artificial intelligence techniques, the project is to ensure increased sales, optimization of marketing campaigns and better motivated advisers.
- 2** This project aims to increase employee satisfaction and reduce turnover.  
The project will use techniques of data analysis and artificial intelligence to more effectively motivate employees and monitor their level of satisfaction.







FINANCIAL CASE STUDY

# WE'RE HERE FOR YOU

We will arrange a meeting, map your needs, estimate the budget and suggest the best solution.

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