



## **e&e Solutions Case Study**

### **Engagement Overview**

*As part of a Strategic Change Program, e&e were engaged by a financial services treasury organisation to establish a “new operating model” based on an industry standard footing across all aspects of people, process, information and technology. This will encompass the replacement of the front, middle and back office systems to reduce operational risk and enhance the client’s service offering.*

### **Scope of work**

*e&e were engaged on a fixed price, outcome based agreement to provide consulting services to the front and back office projects within the strategic change program. This involved managing an end-to-end RFP process to identify and select industry best practice vendor that most closely aligned to the client’s needs and business strategy. This included:*

- Defining the business needs, establishing the communication strategy, identifying key stakeholders and clearly articulating the evaluation criteria and selection process.*
- Facilitated the definition and identification of project scope, objectives, risks and deliverables as part of the delivery of the Project Initiation Document.*
- Provided thought leadership and strategic thinking on program and project management methodology and practices within the organisation.*
- Created documentation to clearly communicate the RFP process to vendors, including key deadlines, a background and summary of the client’s mission, goals and needs.*
- Managed the RFP evaluation process (including vendor demos, reference checks) through to final vendor recommendation and proof of concept.*

### **Outcome**

*The proof of concept procurement process was concluded successfully which resulted in the commencement of contract negotiations with the selected vendor. In turn, the most optimal solution and vendor partner was selected in terms of meeting both the client’s current and future strategic needs.*