



Analyst enabled senior mgmt. to deploy new health product in large regional bank

Situation

Large bank decided to launch a new project focused on health clinics, needing support with project management and financial analysis as they launched

Placement

Direct support for the Group Head on assorted projects, including financial modeling of new business, setting up project management tools, and capability building on the clinic side, incl. PPT & Excel trainings

Impact

- ▶ Able to more accurately budget for remaining cash runway
- ▶ Instituted processes for tracking task completion across team members
- ▶ Right hand for head of group

Analyst's perspective

The company was launching a new business model, just over a year in. They were facing some internal disorganization and also needed help with financial planning.

During my secondment, **I developed project management tools** and built financial forecasts to assess break-even for the business under different growth scenarios.

This allowed the organization to better organize and monitor tasks across team members and **more accurately budget for the capital they had left.**

In addition, I was involved in capacity transfer and coaching for the company's employees. I trained some of the staff on basic data analytics and financial modelling, preparing PowerPoint presentations, etc. **so that they could do the basics faster and more efficiently.**

- Analyst, supporting a regional bank



“I was able to develop new tools and systems, but just as importantly trained the company’s employees use these systems. This meant they could do the basics without my help.”

4
months

Analyst