



Financial Services Case Study – Numis Securities

QOREX saving the financial services sector time and money

About Numis: “Numis deliver a comprehensive range of stockbroking and corporate advisory services. We help remarkable companies raise capital, drive growth and to realise share ambitions. We strive to be the investment bank of a generation. No matter what size your organisation is, what stage of evolution it’s at, we believe there is a better way of doing business.”

“Numis wanted to increase the delivery velocity and level of excellence across its transformation project portfolio. We chose Qorex to manage the benefit realisation and alignment of the portfolio with the Numis corporate strategy. We wanted a platform that was primarily business facing but that also integrated with our chosen Technology tools. We now manage status reports, risks, costs and progress within the same platform and this is in step with the activities as they are delivered by the different teams across the business. As we move towards an agile delivery model not just within Technology but across the firm Qorex is helping pull the overall change landscape together in an engaging and visual way” Tim Valmas – Executive Director for Technology and Operations

Experienced transformation and change management consultants from QOREX helped the team to revisit the project portfolio and align it with the organisational strategy, ensuring the portfolio was clearly articulated and prioritised. Reporting could now be driven directly from QOREX rather than being pieced together in spreadsheets.

In such a dynamic, high performing organisation, engaging the leadership team in the change portfolio would only work if the communication was clear, consistent and focused. By using QOREX to produce and deliver the portfolio reporting, not only did it make it easier for the leadership team to quickly assimilate the information being presented, it also gained the leadership’s confidence in its transformation and change capability.

QOREX enabled Numis to standardise its programme and project management methodology, benefits management and risk management across the organisation and made it easier for the team to bring it all together and communicate a single version of the truth across the organisation.

Please call Anna on 07776 136913 to arrange a coffee and a chat, where we can demonstrate how QOREX can save you time and money.



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