ALLOY

PRECURSIVE CASE STUDY.
CUSTOMER - ALLOY
RISK MANAGEMENT PLATFORM

PRECURSIVE

PLAN. TRACK. FORECAST.

CUSTOMER: **ALLOY.**

Alloy solves the identity risk problem for banks and fintech companies. They help clients onboard their customers, make credit decisions, and monitor transactions in a way that maximizes conversion, minimizes fraud and compliance risk, and reduces manual intervention. Starting from the initial stages of origination and account setup, Alloy equips banks and fintech firms with a versatile and scalable solution for overseeing identity risk at every phase of the customer journey. Through customizable features addressing fraud, credit, and compliance risks, along with expert guidance and an extensive network of data partners, Alloy empowers companies to extend outstanding financial offerings to a broader global clientele.

www.alloy.com

"What drove it for us was its [Precursive] integration with Salesforce, it solved both problems - incorporate project plans into Salesforce ecosystem and access to existing data ie revenue of each client. In addition to that, the ability to share information out easily through SF dashboards & reports, and we know that the data is reliable. Precursive allowed us to scale, and we now have 10 implementation managers managing over 100 implementations at one time, 3 product buckets and lots of different client types. And we have reliable, up-to-date data on each one"

JAMES ASHTON.
Director of Professional Services
ALLOY

PRE**CURSIVE**

HOW ALLOY **USES PRECURSIVE.**
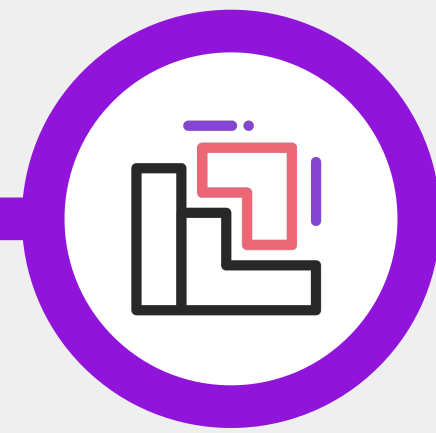
1. **Project Templates**
Project templates can be built and refined overtime. 10-20 projects managed at once.

2. **Customer Collaboration**
Ability to share detailed project plans with clients to keep them in the loop.

3. **Reporting**
Reporting across all key metrics including project progress and time-to-value.

4. **Task Allocation**
Break down a project or process and assign tasks to individual teams.

5. **Tracking KPIs**
Utilization & capacity
Time to launch
Time spent by product

Key point: "We've customized the board details quite heavily to give us the data that we need."

PRECURSIVE

CUSTOMER **CHALLENGE.**

The services team grappled with an overwhelming manual workload, causing a substantial bottleneck in operational efficiency. Tasks that could have been automated demanded a significant amount of time and effort, hampering the team's productivity and diverting their focus from more strategic, value-added activities, leading to delays in project timelines and increased the likelihood of human errors.

The absence of a robust reporting reporting system for key performance indicators (KPIs) and metrics presented a major challenge. The team was operating in the dark, unable to gain critical insights into their performance and the overall health of projects. This lack of visibility hindered their ability to make informed decisions and proactively address potential issues. They couldn't track launch times or identify patterns in project delivery, making it difficult to pinpoint exactly where projects were getting stuck.

THE **SOLUTION.**

salesforce
The World's #1 CRM

PRECURSIVE
The Services Delivery Cloud for Salesforce

Opportunity Creation
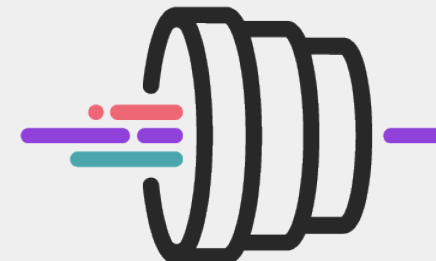### Quote Management

Manage customer data
Forecast opportunities
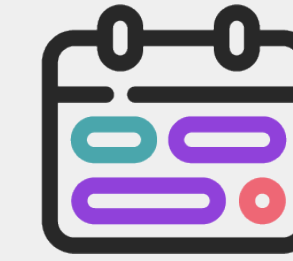Sales of products and services

Task Allocation
Project Management
Resource Allocation
Capacity Planning
Revenue Management
Services Billing

Plan and manage projects
Allocate activities and tasks
Collaborate with customers

Schedule and manage teams
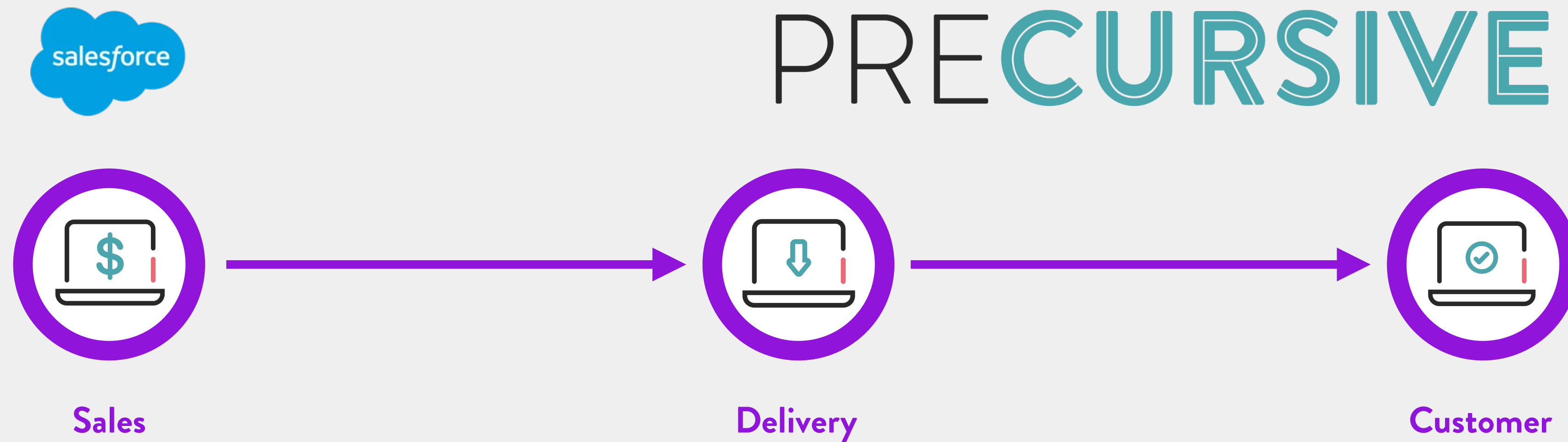Forecast capacity crunches
Automate staff notifications

Monitor budgets and costs
Forecast and recognize revenue
Track time and expenses

THE **SOLUTION.**

Alloy have been using Precursive for over 2 years to help streamline their project processes, predict when they will have revenue gaps and automate admin tasks.
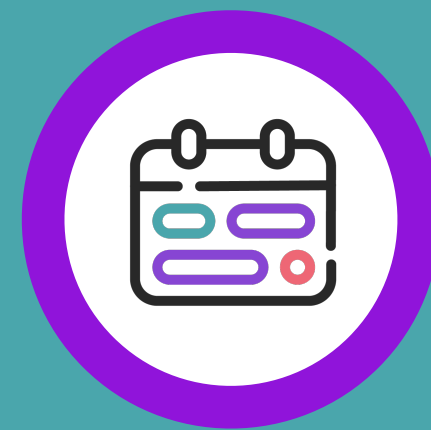

Sales → **Delivery** → **Customer**

PRECURSIVE **SOLUTION.**

PROJECT TEMPLATES.
Built and refined over time

Streamline future projects, ensuring they benefit from the accumulated knowledge and best practices.

ACCESSIBLE.
SaaS Platform

A tool which can be used from anywhere enhances flexibility and collaboration, enabling work across multiple teams.

COLLABORATION.
Internally & externally

Precursive board templates save a lot of time and bring consistency when managing tasks. A centralized system improves transparency

EMPOWERING SERVICES **TEAMS.**

CUSTOMER SUCCESS.

ENABLING OUTCOMES

Precursive team with enterprise experience at ABB, Fujitsu, Roche

LIGHTNING NATIVE.

TECHNICAL INNOVATION

> $1 Billion in project value managed in Precursive

ENTERPRISE SECURITY.

TRUST & PRIVACY

GDPR compliant
ISO 27001:
2013 certified

PRECURSIVE

★★★★★ 5.0
Average Rating

PRECURSIVE **CUSTOMER SNAPSHOT.**

High Tech.

Google   MHR   ALLOY   BetterCloud   GONG

Professional Services.

Challenger   torrent CONSULTING   Talentful   JACK MORTON   cts

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THE SERVICES DELIVERY CLOUD FOR SALESFORCE

PLAN. TRACK. FORECAST.

www.precursive.com