IRS Section Report

XXX Section

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# Participants (Experience, Interviewers)

## Experience

RM1 (Relationship Manager)

RM2

PM (Portfolio Manager)

ED (Execution Desk)

MO (Middle Office)

## Interviewers

IRS Reference

PM

Facilitator

## Key Figures

nn RM distributed by geographical region

nn new accounts per year

nn Portfolios

# Scope, Product, and Purpose

## Scope

What and what not

## Product

Expected Solution

## Purpose

Quality of expected solution

# Available Information and its usage

## Function 1

## Function 2

## Function nn

# Required Information, pt. not available

## Function 1

## Function 2

## Function nn

# Value of Required Information

# Information Flow

|  |  |
| --- | --- |
| To Function | From Function |
|  |  |
|  |  |
|  |  |
| Maintained by Order Handling (departments) |  |
|  |  |
|  |  |
|  |  |
| From Function | To External/Function |
|  |  |
|  |  |
|  |  |

# Suggested Enhancements to Systems

# Suggested Integration of Systems

# Expected Benefits from Enhancements

# Suggestions for (new) Solutions