

Raymond James Bank Saves Time, Increases Accuracy with Workiva for Board Reporting

ABOUT RAYMOND JAMES BANK

RAYMOND JAMES *Bank*

Raymond James Bank is about more than just banking. Through a holistic approach to finance, they offer innovative and diversified products and services to the public and to clients of Raymond James Financial.

Disconnected Challenges:

Leadership was tasked with improving their board reporting process, looking at existing technology as a way to reduce risk and be more efficient.

Why They Chose Workiva:

- Accurate cloud platform with more governance and less process risk
- Ability to add many users and team members across the organization while maintaining security and control
- Remote collaboration while increasing efficiency

Connected Results:

- Greater accuracy through linked text and numbers across analysis and reports, instilling confidence in the board that information is reliable for making timely and data-supported decisions
- Faster reporting through the elimination of manual slide consolidation and the ability to roll frameworks into the next report
- Adopted by 95 different users across the organization allowing for streamlined processes, fewer meetings and back-and-forth emails, and increased visibility with a reduced potential for risk



“It was absolutely a partnership from the beginning between myself, the businesses, and Workiva.”



KELLY HERMES

Vice President - Project Management Office
Raymond James Bank, N.A.



“Instead of scrambling to combine different documents and dreading last-minute updates, using Workiva for our board reporting process has helped us collaborate remotely without missing a beat.”

KELLY HERMES

Vice President - Project Management Office
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