



CUSTOMER PROFILES

\$8 Billion U.S.-Based Charitable Trust

This Charitable Trust used the rules engine, workflow manager, and integrations in the Decisions no-code automation platform to support various digital strategies to modernize legacy systems and ensure regulatory compliance, accelerating profitability, cutting time for monthly accounts reconciliation from 3 weeks to less than 1 hour, saving 25% in daily transaction processing, and reducing other administrative tasks by 10-15%.

INDUSTRY: FINANCIAL SERVICES

- ✓ RULES ENGINE
- ✓ WORKFLOW MANAGER
- ✓ INTEGRATIONS

“By orchestrating processes more effectively, we have released the cognitive effort of our investment management team for more productive uses that are more valuable, and more fun for them. Now they are more focused on investment strategy and research and less on transactional processing, which has improved the robustness of our institutional processes and decision-making.”

