

Streamlining Workflow, Automation, and Delivery for MeridianLink's Creative Services with monday.com



ORGANIZATION

MeridianLink is recognized as a leader in loan origination software, established in 1998. Their stated vision is to transform financial services technology for the better. MeridianLink connects financial institutions and fintech companies of all sizes. MeridianLink solves complex problems with powerful yet practical solutions.

CHALLENGE

MeridianLink sought to optimize project management and automate processes within its creative services and marketing operations teams.

Although the MeridianLink team was already proficient in monday.com, they needed external consulting expertise to meet specific requirements.

The primary challenges were:

- The team needed to hire an outside consultant to assist with tedious board builds.
- There was a need to move the team away from using monday.com primarily as a "to-do" list.
- MeridianLink needed help continuing process automation for the Marketing Operations and creative teams.
- The team manages six product channels and corresponding campaign teams, which are typically aligned with those channels. Their delivery model consists of Strategy, Planning, Creative (which may require synchronization), Review, and Execution/Operations.
- Tasks tied to their delivery calendar include virtual and on-premises events and trade shows.
- The operations team may require integration with creative services boards.

The XTIVIA Solution: Collaborative Engagement and Workflow Deployment

XTIVIA utilizes its standard four-stage engagement process to support MeridianLink delivery targets:

1. **Discovery:** Determine what MeridianLink needs to accomplish with monday.com software.
2. **Strategy:** Determine the best use of resources for the most efficient and effective achievement of MeridianLink's business targets.
3. **Implementation:** Execute the strategy with an action plan in place, including regular interval reporting and visibility in monday.com.
4. **Evaluation:** Review what has been learned from performance and results.

Phase 1 Deliverables (Initial Engagement Scope)

The initial proposal centered on a 30-hour engagement. Key deliverables included:

- A full-team discovery and planning meeting.
- Shifting the Existing Board Review and New Board builds away from a "to-do" list use scenario and towards a delivery model workflow incorporating automations and dependencies.
- Establishing Calendar integration/notifications.
- Creating visual representations of the six business channels using color coding.
- Providing Best-practice documentation.
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Phase 2 Deliverables

The subsequent phase was designed for continuous improvement and expansion of capabilities:

- Additional ongoing monday.com support managed services.
- Additional board builds and board maintenance, as required.
- Improved Dashboards for reporting.
- Additional Integrations, including possible Microsoft integrations.

BUSINESS RESULT

The collaboration between XTIVIA and MeridianLink resulted in the successful implementation and launch of an optimized workflow, meeting all initial project milestones and significantly exceeding expectations. The dedicated US-based professional services team met the crucial deadline by expanding the XTIVIA team.

"XTIVIA's ability to meet our incredibly tight delivery timeline was a game-changer. They completely transformed our delivery schedule by introducing efficient forms and updating our processes. The managed services option for ongoing support was exactly what our rapidly growing business needed to keep that momentum going."

– Kary Burns, VP Creative Services, MeridianLink

This rapid, high-quality delivery included a foundational transformation of MeridianLink's project management, **shifting the team away from a basic "to-do" list** use case toward a **sophisticated delivery-model workflow** incorporating automations and dependencies. XTIVIA provided the essential deliverable details, including **calendar integration/notifications**, visual representations of the six business channels using color coding, and **comprehensive best-practice documentation**.

By meeting these core requirements within the engagement window, the partnership established a framework for operational clarity and efficient management, positioning MeridianLink for immediate benefits, including **improved dashboards and additional integrations**.

ABOUT XTIVIA

XTIVIA is a leading B2B technology solutions provider that bridges legacy systems with modern innovation. With over 30 years of experience, we offer comprehensive expertise across Data & AI, Apps & Integration, Cloud & DevOps, Business Solutions, and Managed Services.

If you can imagine the business outcome, XTIVIA can create it with intelligent technology and AI-powered solutions.

XTIVIA has offices in Colorado, New York, New Jersey, Texas, Virginia, and India. www.xtivia.com