EPMO

Oversight

Systemic Solutions

Tools of the Trade

Managing Change

Transparency

The Proper Approach

You are Here.

How do you manage projects?

By: David Noël | Genesys Technology Group, LLC
david.noel@genesystg.com

"Operations keeps the lights on, strategy provides a light at the end of the tunnel, but project management is the train engine that moves the organization forward."

- *Woody Williams*

Can you relate?

Strategic
Initiatives

In House to Outsource
Core Conversion
Ancillary Conversions
Branching
New Services
New Products
Fintech
Bank as a Service
CRM
Data Analytics
Digitization
Exams
Audits
IT Security
Target Marketing
LPOs
New Hires
and on...and on...

Can you relate?

Project management is a critical component of your strategic plan.

Strategic
Initiatives

In House to Outsource
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dis•rupt•or

a company or form of technology that causes radical change in an existing industry or market by means of innovation.

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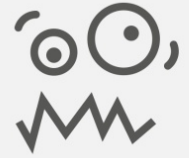
NeoBanks

Varo chime®

SoFi N̄26

Current

NOVO MoneyLion

ONJUNO

$ Cash App

axos BANK lili

dis•rupt•or

a company or form of technology that causes radical change in an existing industry or market by means of innovation.

NeoBanks

FinTechs

- Spent the last two decades **reacting to the regulators**, **consolidating vendors**, and **reducing costs**
- For most bankers, **all of your eggs** are in one basket and our core vendors **cannnot keep up**.
- Disruption has **exposed a nerve**
- Innovation is a **necessity** and project management plays a **foundational role**
- **Legacy systems** are necessary but require isolation
- We have to start thinking outside of our core ecosystem and migrate back to a "best of breed" approach

Banking is Changing
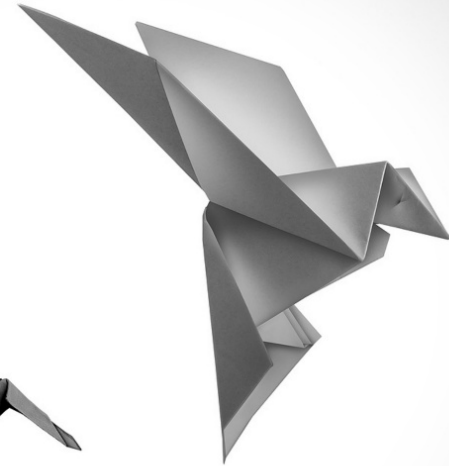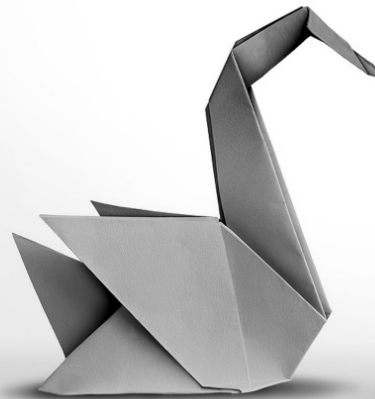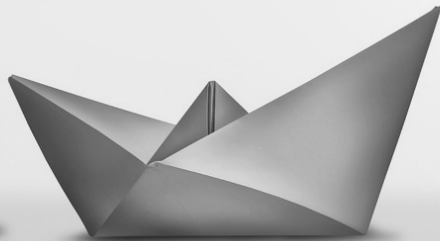
We have to get better at managing strategic projects.

Banking is Changing

We have to get better at managing strategic projects.

From here.   To here.

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Consolidated Approach

Consolidated Approach

- Manage Entire Program/Project

Consolidated Approach

- Manage Entire Program/Project
- Examine all Dependencies

Consolidated Approach

- Manage Entire Program/Project
- Examine all Dependencies
- Utilize all Business Lines

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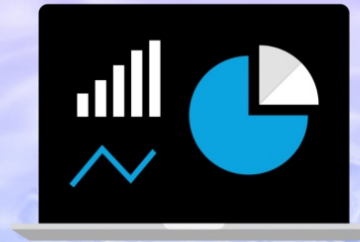david.noel@genesystg.com

Transparency

Visibility is the key to accountability

Project
Charter

Visibility
across your
entire
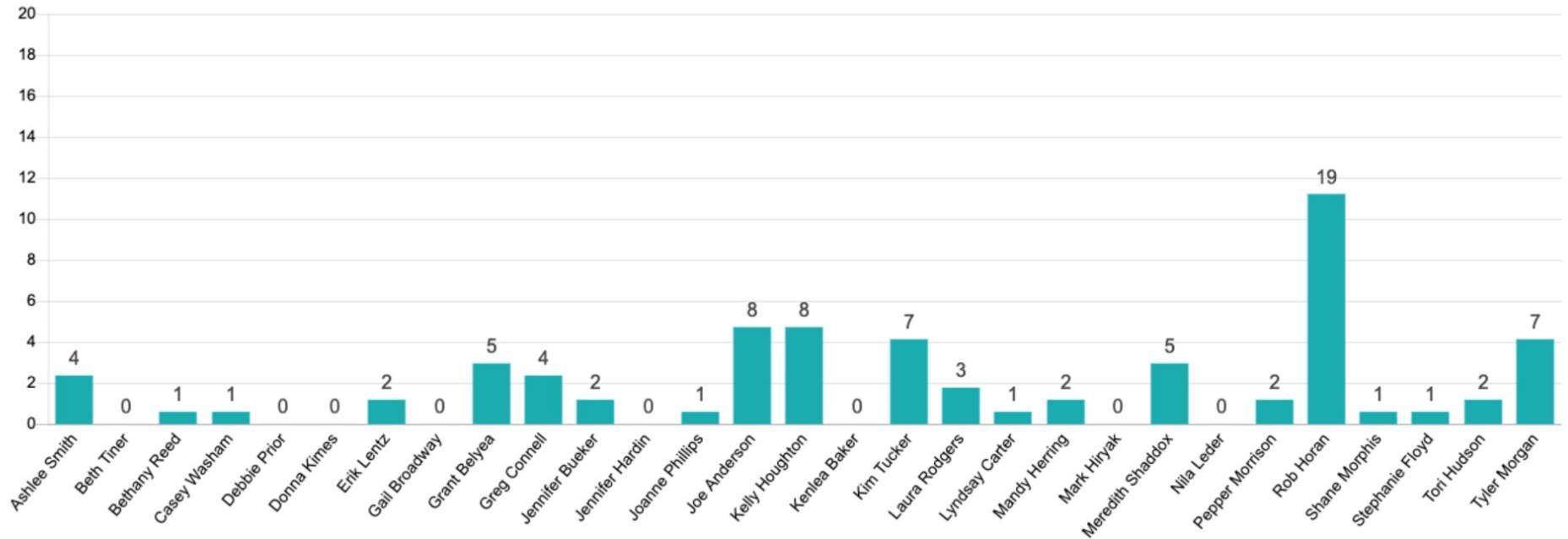organization
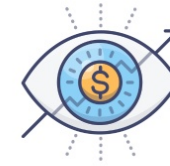
Management
Insight

Accountability
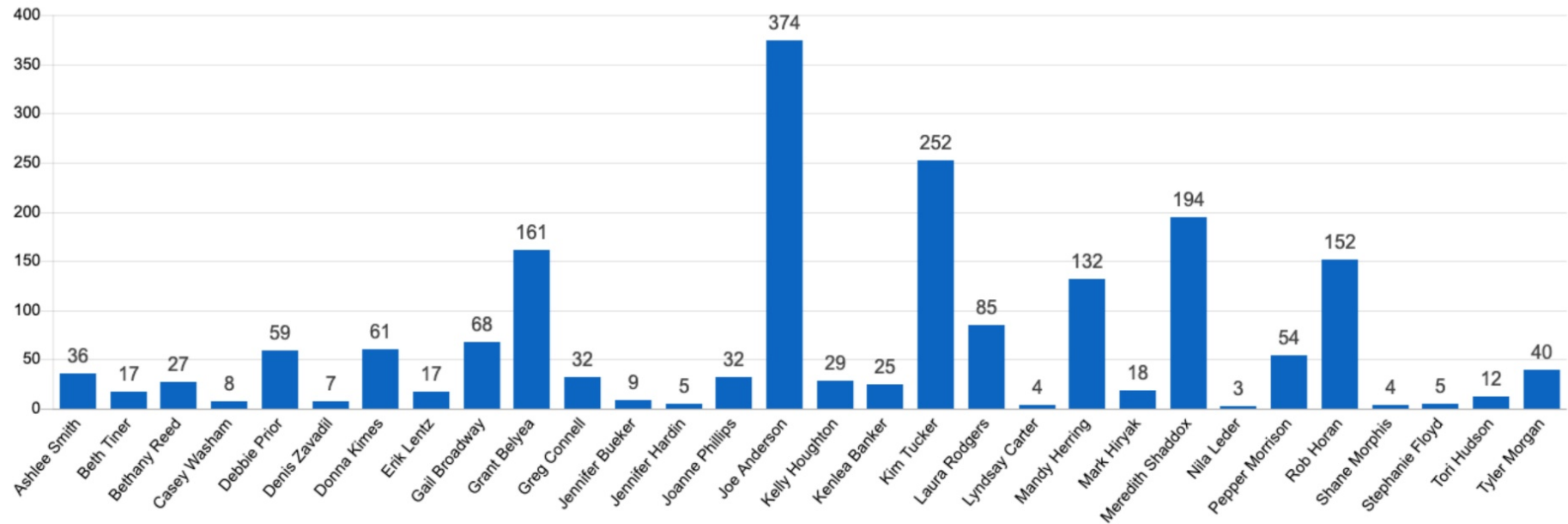
Visibility = Better Leaders

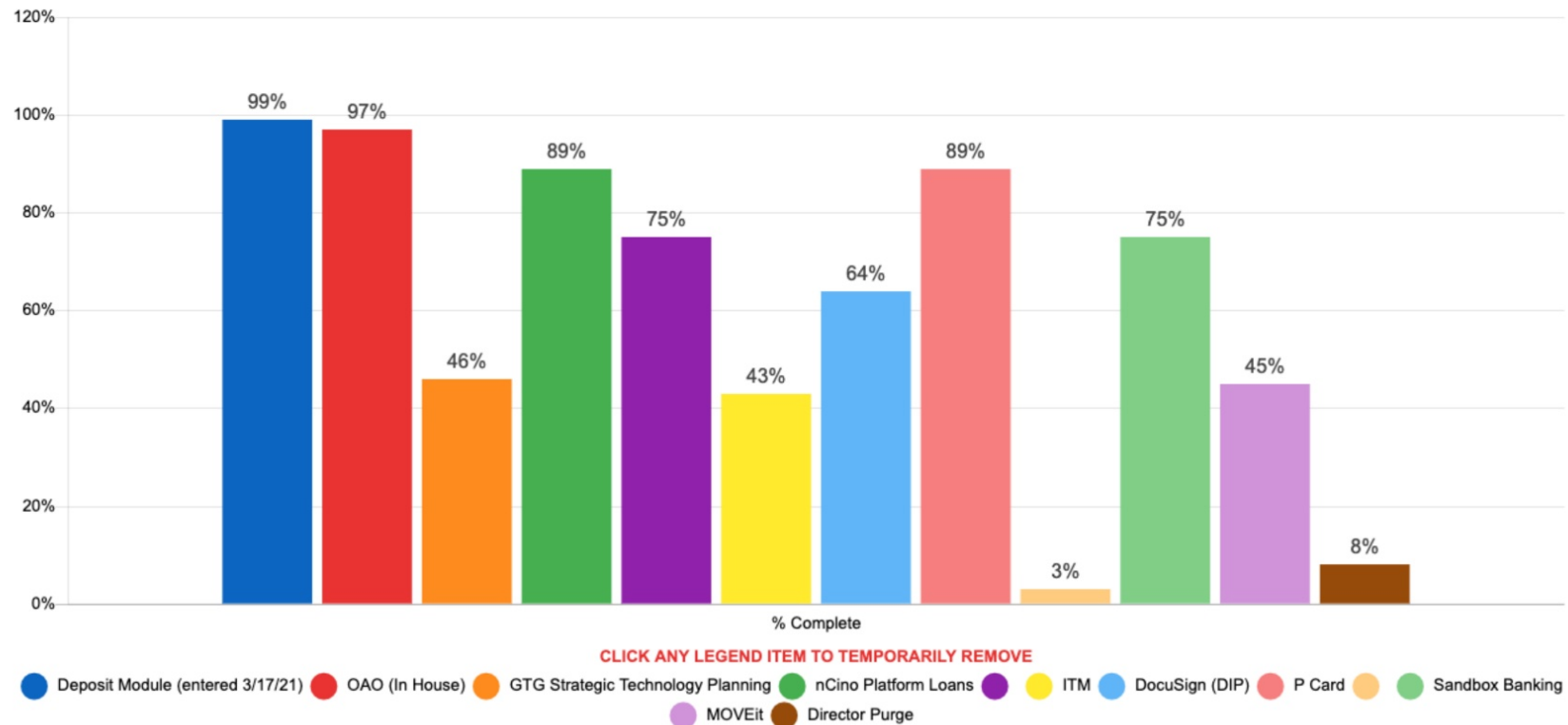**Projects by Staff Member**

Transparency = Accountability
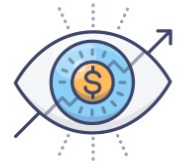
Number of Tasks by Staff Member - COMPLETED

Staff Member	Tasks
Ashlee Smith	36
Beth Tiner	17
Bethany Reed	27
Casey Washam	8
Debbie Prior	59
Denis Zavadil	7
Donna Kimes	61
Erik Lentz	17
Gail Broadway	68
Grant Belyea	161
Greg Connell	32
Jennifer Bueker	9
Jennifer Hardin	5
Joanne Phillips	32
Joe Anderson	374
Kelly Houghton	29
Kenlea Banker	25
Kim Tucker	252
Laura Rodgers	85
Lyndsay Carter	4
Mandy Herring	132
Mark Hiryak	18
Meredith Shaddox	194
Nila Leder	3
Pepper Morrison	54
Rob Horan	152
Shane Morphis	4
Stephanie Floyd	5
Tori Hudson	12
Tyler Morgan	40

Management Insight is Crucial

Projects In Process

CLICK ANY LEGEND ITEM TO TEMPORARILY REMOVE

- Deposit Module (entered 3/17/21)
- OAO (In House)
- GTG Strategic Technology Planning
- nCino Platform Loans
- ITM
- DocuSign (DIP)
- P Card
- Sandbox Banking
- MOVEit
- Director Purge

Transparency + Accountability = GTD

Projects Completed / Modified - Last 90 Days

Chart showing 22 bars, each at 100%, labeled "% Complete". Y-axis from 0% to 150%.
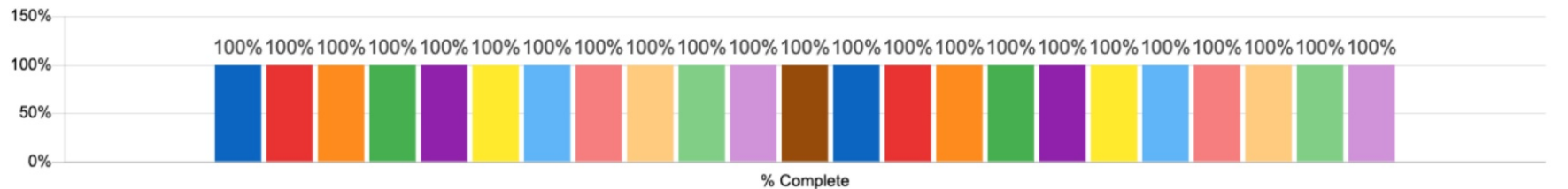
Legend:
- Mortgagebot (NXTSoft) Executive Sponsor: Kelly Houghton Project Owner: Lisa Sutterfield
- Harland Clarke Services Executive Sponsor: Greg Connell Project Owner: Ashlee Smith
- Mitel Migration/Implementation Executive Sponsor: Rob Horan Project Owner: Mandy Herring
- Re-evaluate the FCRM fraud rule sets and tweak to meet business needs (HOLD)
- Zix Cloud Executive Sponsor: Rob Horan Project Owner: Tyler Morgan
- IT Ops Room
- Reconfigure Network Closet and Outsourced Gear in Stuttgart Data Room
- Data / Telecom Provider Switch (Century Link to AT&T) Executive Sponsor: Rob Horan Project Owner: Joe Anderson
- Printer Logic (Vasion)
- Physical Security Overhaul
- Secure Admin Architecture Project
- Decommission BOF Fileshares
- Transfer Now (Fiserv)
- Incident Response Enhancements (Branch)
- Deploy Z Scaler NSS Appliance and Sumo Collector Server in AWS
- Enhance network segmentation
- Enhance Sumo Logic data aggregation and analysis to include:
- TIB Canadian Collection Items
- Work with E-Banking to Establish Enhancements to Debit Card Fraud Processes to Reduce Potential Losses (this may be accomplished in collaboration with Secura)
- Work with Secura and Operations to enhance security controls in E-banking processes
- Call Center
- Core Name Cleanup with IFB new Accounts
- Automate HR to AD sync (Active Directory)

Getting things done!

"A systematic approach to dealing with the transition or transformation of an organization's goal, processes or technologies".

Communicate Expectations

Business Units
Departments
Teams
Third-Parties

Define changes.

Assemble your team.

Identify management sponsorship.

Secure commitment from management.

Develop implementation plan and metrics.

Collect, assess, and analyze data.

Quantify gaps and understand barriers.

Modify plan and loop back to the most recent step.

CHANGE MANAGEMENT

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Deploy the proper tools.

Just say no.	Collaborative	Cloud-Based	Secure	Resource Allocation

Welcome to Smartsheet

smartsheet
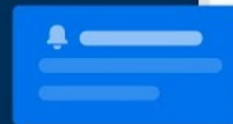
Q3 project overview

Main table | ☰ Timeline | ⊓ Kanban | ◫ Dashboard | + | ⚡ Integrate | 🤖 Automate / 2 | ^

This month

	Owner	Status	Timeline	Due date	Priority	+
Finalize kickoff materials		Done	▬▬▬	Sep 15	★★★★☆	
Refine objectives	👤	Working on it	▬▬▬	Sep 19	★★★★★	
Identify key resources	👤	Stuck	▬▬▬	Sep 22	★★☆☆☆	
Test plan		Done	▬▬▬	Sep 26	★★★☆☆	

Next month

	Owner	Status	Timeline	Due date	Priority	+
Update contractor agreement		Done	▬▬▬	Oct 10	★★★★☆	
Conduct a risk assessment	👤	Working on it	▬▬▬	Oct 13	★★★☆☆	
Monitor budget	👤	Stuck	▬▬▬	Oct 19	★★★★☆	
Develop communication plan	👤	Done	▬▬▬	Oct 22	★★☆☆☆	

monday.com
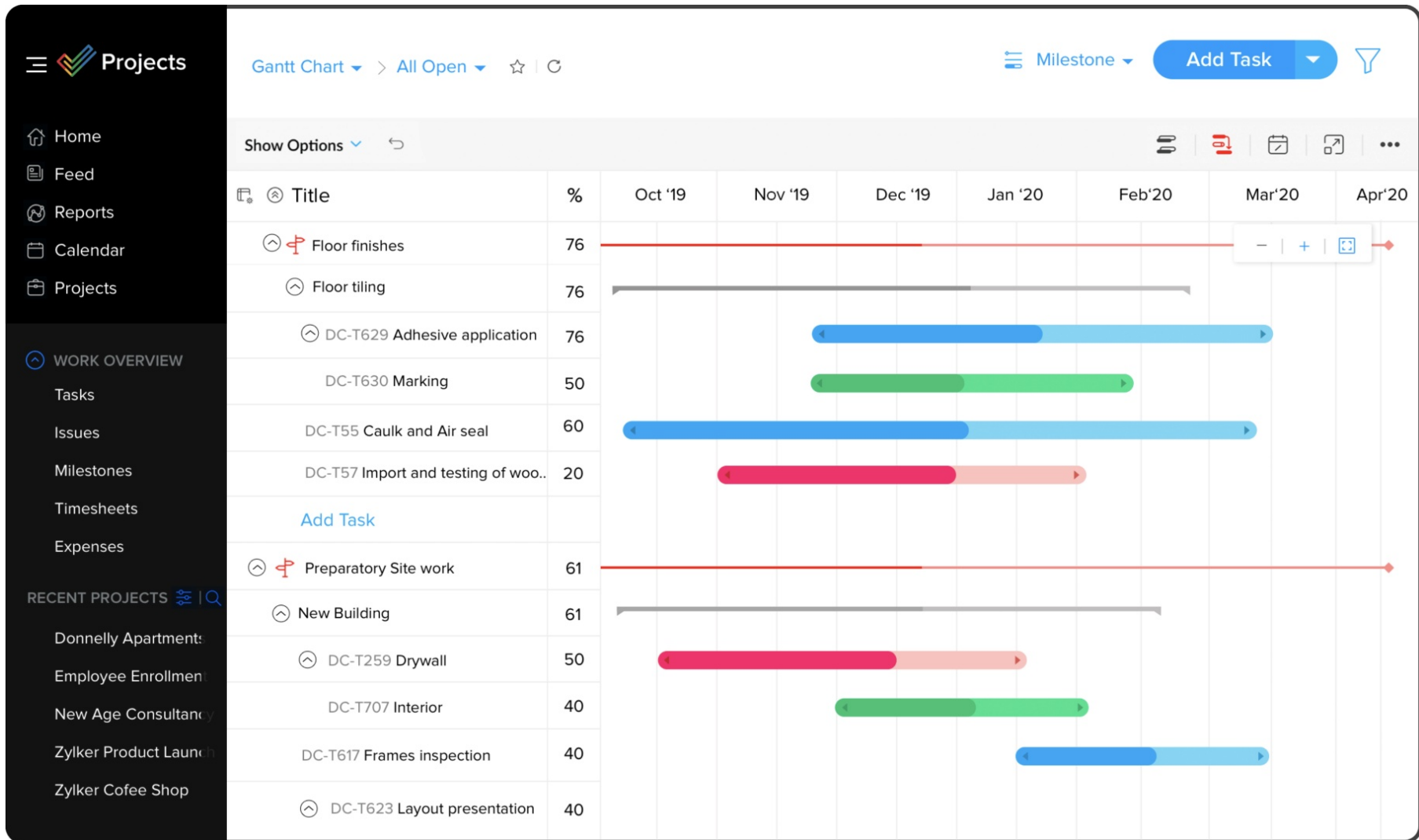
Systemic Solutions

Project requirements

Tracking/Status

SSOT

Automation

Functionality

Workflow

Reporting

Notifications

Oversight

"Forced" Collaboration

"Forced" Collaboration

col·lab·o·rate | \ kə-la-bə-rāt

: to work jointly with others or together
especially in an intellectual endeavor

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1. Be careful

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2. Adoption is vital

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3. Assign leadership based on super powers

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4. Healthy group dynamics takes time

"Forced" Collaboration

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3. Assign leadership based on super powers

4. Healthy group dynamics takes time

Those resistant to **collaboration** and **adopting** the tools might not be healthy for the team.

Enterprise Project Management Office

EPMO

Corporate Covernance	Compliance	Risk Management	Program Management	Risk Assessment	Readiness Review
1	2	3	4	5	6