

Project Startup Report

Submitted to Large Project Oversight on 11/24/2021

GENERAL INFORMATION

Project Name: Dynamics One Stop Shop (DOSS)

Agency Name: Bank of North Dakota

Project Sponsor: Lindsay Wagner

Project Manager: Jenna Buksch

PROJECT DESCRIPTION

In 2020, Bank of North Dakota (BND) engaged consultants to perform a feasibility study on implementing Dynamics365 to improve management of our loan pipeline, loan lifecycle servicing, Customer Relationship Management (CRM), and to create an online loan application and document portal. This feasibility study was presented to the BND Executive team on 3/12/21 and approval was obtained to request bids for the development of a system. The feasibility study identified system requirements which will be validated as part of the Analysis phase of the project.

PowerObjects has been selected as the vendor for the project and the proposed system, DOSS (Dynamics One Stop Shop), will replace the existing Baker Hill and Salesforce systems which BND currently uses for managing the loan pipeline, tracking outstanding and ongoing required loan documentation, CRM, and provide additional functionality.

BUSINESS NEEDS AND PROBLEMS

1. Create efficiencies for internal employees by combining 3 separate systems (Baker Hill, Salesforce CRM and SharePoint approvals) into a single application.
2. Improve loan processing for partner institutions by allowing for more customer self-service through the new online portal.
3. Create a bank-wide CRM solution for tracking and loan origination

PROJECT BASELINES

Project Start Date	Baseline Start Date	Baseline End Date	Baseline Budget
03/22/2021	11/03/2021	06/03/2022	\$955,000

OBJECTIVES

Business Objective	Measurement Description
Implement new CRM system and decommission use of the current systems (Baker Hill, Salesforce CRM, and SharePoint approvals).	Upon completion of each release, each included module is fully deployed and functioning according to documented requirements.
50% of lead lenders actively adopting the online portal	Application audit reporting to identify lead lenders who are using the online application.
75% to 80% of BND users actively using the new CRM solution	Application audit reporting to identify employees who are using the online application.

KEY RISKS

1. Baker Hill Data Extracts
 - Full Data extracts could take up to 4 weeks from the vendor and could affect PowerObject's ability to analyze data for the project.
 - To mitigate this issue, the team is using the Baker Hill software reporting tool to pull as much information as possible for PowerObjects to be able to analyze.
2. XpertDocs Procurement
 - XpertDocs is needed software for document creation for use with the DOSS system.
 - BND procurement is working with NDIT to purchase this software directly from an ND approved seller.
3. Fiserv NDA
 - We will be using the Communicator Advantage (CoA) tool from Fiserv to interface between the core and the DOSS system. Fiserv is requiring an NDA between themselves, PowerObjects, and BND. This could delay discovery work on the APIs required for CoA and eventual integration.
 - We are working with Fiserv and PowerObjects to complete the NDA quickly. BND's legal has already approved the NDA.