



Project Management

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Chief Lending Officer

Arrowhead
credit union

Key Projects

- Online/Mobile Banking
- Lending Origination System
- Data Warehouse
- Image Enabled ATMs
- Service Surveys
- Mergers



PMP Certification

- Globally recognized certification
- Portable if PM is an aspiration
- Months leading project
 - Document all project time/capacity

Education	Project Lead	Training/Contact
HS/Associates	60 Months	35 Hours
Bachelors	36 Months	35 Hours



Approach

- Style – Direct, supportive, lead organizer, traffic cop
- Hold people accountable
 - Remove obstacles
 - Hands on
- Assign or be assigned
- Lead confidently



Critical Considerations

- Timeline
- Project Documentation
- Resources
- Customer/End User
- Project Meetings
- Communication
- Go-Live Preparation



Timeline

- Plan forward/Work backwards
- Hard/soft live date
- Key milestones
- Go/No-Go Date



Example

MCU - Timeline						
Task #	Task	Date	Turn Around	Owner	Recipient	Status
1	Engage ALM First	1/7/2022	1 Day	CFO	ALM First	
2	Conduct Due Diligence	1/10/2022	21 Days	PM	CEO	
4	Return Valuation	1/25/2022	18 Days	ALM First	CFO	
5	ACU Board Vote	1/26/2022	1 Day	Darin	PM	
3	MCU Board Vote	1/27/2022	1 Day	Darin	PM	
6	Provide Financial Analysis	2/18/2022	3 Days	CFO	PM	
7	Packet Submitted	2/24/2022	8 Days	PM	Regulators	
8	TWHC Vote Engagement	3/15/2022	1 Day	M CU	TWHC	
9	Approval	4/11/2022	45 Days	DFPI/NCUA	ACU	
10	Send Data to TWHC	4/12/2022	1 Day	PM	TWHC	
11	Send CURE Notification	4/12/2022	1 Day	PM	NCUA	
12	Mail Ballots	4/27/2022	15 Days	TWHC	Members	
13	Membership Vote	6/17/2022	51 Days	Members		
14	File with SOS	6/20/2022	42 Days	SW&M	SOS/DFPI	
15	Effective Date of Merger	7/1/2022	1 Day	SOS/DBO	SW&M	
17	Standard Conversion	11/1/2022	122 Days	PM	Team	

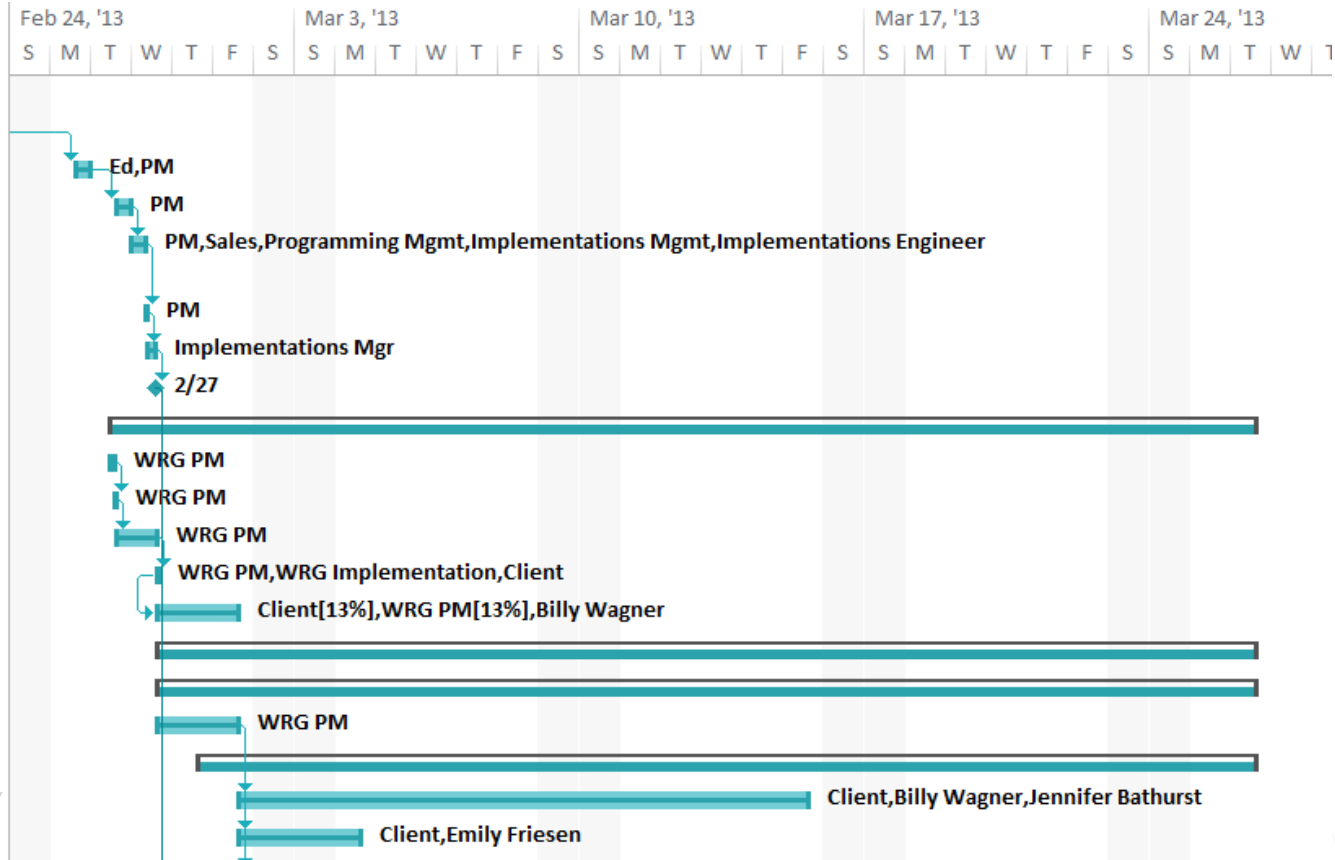


Tools of the Trade

- Project Plan
 - MS Project
 - MS Excel
- Shared project calendar
 - MS Outlook
- Project Plan / Action Items



Project Plan



Resources

- Vendor Vs Internal
- Project Structure
 - Steering Committee
 - Sub Committees
- Project Inclusion / Decision Making
 - Document critical decisions



End User/Customer

- Define end user
 - Could be more than 1
- Technology vs People
- Develop buy-in strategies
- Exhaustive training
- Front End vs Back End
 - Differing risk models



Project Meetings

- Determine frequency/attendees
 - Subcommittees
- Set goal prior to meeting
 - Limit surprises
 - Accountability
- Meeting minutes
- Capture new/updated deliverables



Communication

- Determine audience(s)
- Level of communication
- Example Merger Vote
 - Micro Site
 - Mail
 - Email
 - Talking Points



Go-Live Prep

- Mitigate Risk
- Create resource/escalation Plan
- Identifiable obstacles
 - Known/Unknown
- Resources for go-live (Phone availability, escalation plan, situation room, centralize issues/resolutions)
 - Early indicators for success/challenges





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