

# A SEG Onboarding

## EXECUTIVE & PROGRAM LEADERSHIP

**Dave Blum, Jordan Mueller and Scott Zulpo**

Provide vision, strategy, support and guidance to the team, helping to resolve issues and remove obstacles when the team is unable to.



**Dave Blum, Executive VP, Relationships & Service Delivery**  
**Jordan Mueller, VP Program Delivery**  
**Scott Zulpo, Senior VP, Chief Technology Officer**

## PROJECT LEADERSHIP

**Sheila Gurley**

Defines project boundaries, develops project plan, manages project budget and schedule, coordinate teams, and ensures timely stakeholder communication.

**Luke Musinski**

Steering the project teams in executing project tasks, motivating and improving team performance, and solving technical issues or bottlenecks.



**Sheila Gurley, Senior Project Manager**  
**Luke Musinski, IT PMO Manager**

## PROJECT WORK TEAMS

Requirements development and execution.

Production of branded products.

Development of Member Services products (i.e. credit cards, debit cards, checks, web pages, member letters, and notices).



### BCU Internal Teams

- Consumer Lending
- Consumer Loan Origination
- Debit Operations
- Digital Services
- Marketing
- Member Intelligence
- Member Experience
- Member Operations
- Information Systems

### External Support Partners

- Symitar
- Harland Clarke
- Micro Dynamics
- Entrust Data Card
- PSCU (Debit & Credit Cards)
- RBA
- Lumen (Credit & Debit Card Pages)
- Harland Clarke
- Medallia

Internal Team

External Team

Operations Team

Go Live Implementation Teams



# A SEG Onboarding

## New A SEG Introduction Development Workflow

### BUSINESS DEVELOPMENT

#### Submit Request to PMO

- Company Profile
- Technology Go Live Target
- SEG Classification
- Employee File
- Payroll Allocation
- Pertinent Implementation Notes

### IT PMO INTAKE & PLANNING

#### IT Programmatic or Market Requirements Received

- Confirm A SEG Requirements | QA Branding Tool
- New SEG Code and Employee File Requirements Documented
- Internal IT Kickoff
- Brand Code, SEG Code, and Scheduled Technology Date Communicated

#### Value Stream Work Notifications

- IT Systems
- Consumer Lending
- Credit & Debit Cards
- Digital Services
- Member Experience
- Marketing
- Member Intelligence

#### PM Notifications / Sub-Processes

- INV Portfolio Management
- Business Development
- Account Services
  - Payroll Allocation Process (if Applicable)
- Member Experience
- SEG Drop Down Menus
- LOS
  - Prepare Workflows
  - SEG Classifications
- Marketing
- Custom SEG Communications

### QA, DEVELOPMENT & OPERATIONS

#### QA Processing

- New SEG Code Branding Tool Update and Publication
- After Dev Change Control Verify Files: Letter, Help, File Contents, Data, etc., Pulled from Dev.

#### QA Processing

- After Dev Change Control Verify Files: Letter, Help, File Contents, Data, etc., Pulled from Dev.
- Review/Approval from IT Change Control Meeting

#### Development

- Move SYM files to Designated SYM, Generate Letter Files
- Verify Help File Contents to New SEG
- Run SYM Job to Retrieve Data from SYM to Datawarehouse
- Update Dev Notes and Approve Dev Step using Non-Emergency Change Control

#### OPERATIONS

- Update QA Branding Tool with New SEG Codes and Publish Files
- Move SYM files and Generate Letter Files
- Verify Help File Contents
- Update Deployment Notes and Approve Operations Step in Change Control

This process does not account for defects, rework, or decisions needed, only accounting for deliverables and activities for a new or updated SEG.

Cycle time to process a new SEG is subject to value stream capacity for the Branding Tool, Symitar (SYM), Blend/NMA, and LOS deliverables.

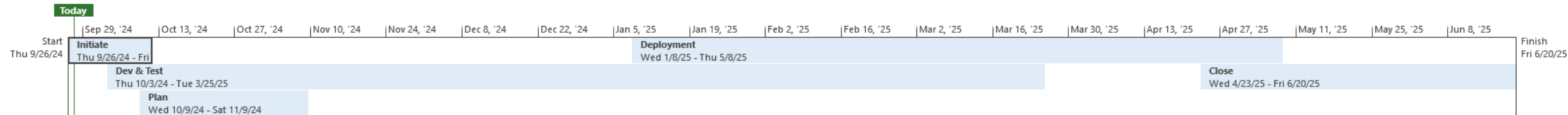
# A SEG Onboarding:

## New A SEG Introduction Business Unit Deliverables

<b>IT Systems</b>	IT Development Research & Analysis	Data Warehouse Implementation	Business Requirements Development & Documentation	Symitar Code Updates	New Member Email
<b>Consumer Lending</b>	Branded Credit Cards			<b>Marketing</b>	List of Logs by Group Creation
<b>Consumer Loan Origination</b>	Loan Decision Rules - LOS			<b>Member Relations Ops</b>	Branded Screen Pop
<b>Credit Cards</b>	Branding Tool Setup			<b>Member Experience</b>	NPS
<b>Debit Cards</b>	Branded Debit Cards (Logos Required)	Branded Instant Issue Cards (Logos Required)		<b>Member Intelligence</b>	Salesforce
<b>Digital Marketing &amp; Digital Services</b>	Branded Online Web Banking Authentication Determination			<b>Member Operations</b>	Branded Letters and Notices
<b>Digital Services</b>	Branded Savvy Money				

# A SEG Onboarding

## Sample New A SEG Introduction Project Plan



Task Name	Duration	Start	Finish
<b>Initiate</b>	<b>12 days</b>	<b>Thu 9/26/24</b>	<b>Fri 10/11/24</b>
Business market requirements submitted to IT PMO	1 day	Thu 9/26/24	Thu 9/26/24
Project Analysis performed and ADO Epic and Feature Created	1 day	Thu 9/26/24	Thu 9/26/24
Builder Programmatic Floorplan Review   BCU Security Review	2 days	Thu 9/26/24	Fri 9/27/24
Design Development, Architect Review, Solution Lockdown	9 days	Thu 9/26/24	Tue 10/8/24
Perform IC Review with BCU	2 days	Wed 10/9/24	Thu 10/10/24
Program Delivery Analysis   High Level Capacity Planning	2 days	Thu 10/10/24	Fri 10/11/24
<b>Plan</b>	<b>23 days</b>	<b>Wed 10/9/24</b>	<b>Sat 11/9/24</b>
Programmatic Estimate and Budget Review	1 day	Fri 10/11/24	Fri 10/11/24
Plan risk management or Site Questionnaire	2 days	Fri 10/11/24	Mon 10/14/24
Determine detailed requirements (cost impacts)	22 days	Fri 10/11/24	Sat 11/9/24
Detailed Project Records Created with Detailed estimate (L3)	2 days	Wed 10/9/24	Thu 10/10/24
Develop schedule (L3) and Shared	1 day	Wed 10/9/24	Wed 10/9/24
Develop budget (L3) for External and Internal Staffing	1 day	Wed 10/9/24	Wed 10/9/24
SEG   BCU Review, Programmatic Acceptance	3 days	Thu 10/10/24	Sat 10/12/24
Update Project Charter	3 days	Sun 10/13/24	Tue 10/15/24
Confirm Team Resources	2 days	Wed 10/16/24	Thu 10/17/24
Approval for Baseline Requested	1 day	Fri 10/18/24	Fri 10/18/24
Baseline Schedule Communicated	1 day	Fri 10/18/24	Fri 10/18/24
Publish Project Records on SharePoint	1 day	Fri 10/18/24	Fri 10/18/24

<b>Dev &amp; Test</b>	<b>124 days</b>	<b>Thu 10/3/24</b>	<b>Tue 3/25/25</b>
Develop technical requirements	49 days	Tue 10/15/24	Fri 12/20/24
Receive Logo	2 days	Fri 12/20/24	Sat 12/21/24
<b>Development Items (IT Systems)</b>	<b>42 days</b>	<b>Tue 12/10/24</b>	<b>Wed 2/5/25</b>
Credit Card (Branding Tool / Testing)	5 days	Tue 12/10/24	Sat 12/14/24
BCU Debit Card (Branding Tool / Testing)	5 days	Tue 12/10/24	Sat 12/14/24
Website URLs	3 days	Tue 12/10/24	Thu 12/12/24
Website Authenticated Online Banking	42 days	Tue 12/10/24	Wed 2/5/25
SEG Debit Card (Final Design)	5 days	Tue 12/10/24	Sat 12/14/24
Letters	42 days	Tue 12/10/24	Wed 2/5/25
Notifications	42 days	Tue 12/10/24	Wed 2/5/25
Website Unauthenticated (CMS)	42 days	Tue 12/10/24	Wed 2/5/25
Statements	42 days	Tue 12/10/24	Wed 2/5/25
<b>QA Items</b>	<b>124 days</b>	<b>Thu 10/3/24</b>	<b>Tue 3/25/25</b>
Statements (Microdynamics)	34 days	Thu 1/9/25	Tue 2/25/25
Branding Tool Configuration	53 days	Fri 12/20/24	Tue 3/4/25
Website testing	58 days	Thu 12/12/24	Sat 3/1/25
Letters, Notices, eNotices (including XDI)	22 days	Sat 2/1/25	Sat 3/1/25
Website certificates, discoverable and publish	56 days	Thu 10/3/24	Thu 12/19/24
Debit Card CAF Edit	3 days	Thu 12/12/24	Mon 12/16/24
NPS	58 days	Thu 12/12/24	Sat 3/1/25
BCU Debit Card (Branding Tool, Symitar)	58 days	Thu 12/12/24	Sat 3/1/25
Blend/NMA Page (Desktop Version)	8 days	Thu 3/13/25	Sun 3/23/25
Savvy Money	3 days	Sun 3/23/25	Tue 3/25/25
Check Images - Harland/Liberty Orders	12 days	Fri 2/21/25	Sun 3/9/25

<b>Deployment</b>	<b>87 days</b>	<b>Wed 1/8/25</b>	<b>Thu 5/8/25</b>
<b>Deployment Items (IT)</b>	<b>83 days</b>	<b>Wed 1/8/25</b>	<b>Fri 5/2/25</b>
Letters	2 days	Wed 1/8/25	Thu 1/9/25
Check Images - Harland/Liberty Orders	14 days	Sun 3/2/25	Wed 3/19/25
Notifications	2 days	Mon 3/24/25	Tue 3/25/25
Statements	2 days	Mon 3/24/25	Tue 3/25/25
Blend/NMA Desktop Version	2 days	Mon 3/24/25	Tue 3/25/25
Website URLs	2 days	Fri 3/7/25	Sat 3/8/25
Website Authenticated Online Banking	21 days	Fri 3/7/25	Fri 4/4/25
Website Unauthenticated (CMS)	2 days	Fri 3/7/25	Sat 3/8/25
Credit Card (Branding Tool / Testing)	2 days	Thu 2/27/25	Fri 2/28/25
BCU Debit Card (Branding Tool / Testing)	2 days	Thu 3/27/25	Fri 3/28/25
SEG Debit Card (Final Design)	2 days	Thu 3/27/25	Fri 3/28/25
Savvy Money	4 days	Fri 3/28/25	Wed 4/2/25
Savvy Money Student Loans	2 days	Thu 5/1/25	Fri 5/2/25
Initiate system & user support	17 days	Thu 4/10/25	Fri 5/2/25
System release & hand-over	14 days	Thu 4/10/25	Tue 4/29/25
Provide post-implementation support	18 days	Tue 4/15/25	Thu 5/8/25
<b>Close</b>	<b>43 days</b>	<b>Wed 4/23/25</b>	<b>Fri 6/20/25</b>
Confirm Interdependent Projects Deployed	23 days	Wed 4/23/25	Fri 5/23/25
Close RAID Log	1 day	Sun 5/18/25	Sun 5/18/25
Release Resources	1 day	Sun 5/18/25	Sun 5/18/25
Send Survey Customer Satisfaction	7 days	Fri 5/30/25	Sun 6/8/25
Conduct Lessons Learned	1 day	Wed 6/18/25	Wed 6/18/25
Close Project	1 day	Fri 6/20/25	Fri 6/20/25
Notify Accounting of Completion	1 day	Fri 6/20/25	Fri 6/20/25



# Branch Management

## EXECUTIVE & PROGRAM LEADERSHIP

Daniel Parsons and Dan Cook provide high-level direction and authority.  
Zeke Hellenbrand manages Branch Operations deliverables outside of IT PMO's scope of work and removes roadblocks.



Daniel Parsons, Senior Vice President  
Dan Cook, Vice President  
Zeke Hellenbrand, Senior Director

## PROJECT LEADERSHIP

Provides day-to-day leadership for planning, implementation, post go live support and closing branch events.

Resolves issues & escalates to Luke Musinski when needed.



Sheila Gurley, Senior Project Manager

## PROJECT WORK TEAMS

Provides leadership with designated product suppliers, completes day-to-day tasks in support of the planning and the go live implementation.



### Internal Core Team

- Network Engineering
- Cybersecurity
- Surveillance Security
- IT Infrastructure & Operations
- IT Branch Operations
- ATM/Debit, Cash Recyclers
- Digital Marketing
- Building Facilities

### External Support Partners

- Converint Technologies
- Powerhouse ATM Riggers
- Burroughs ATM Activation
- Thillens and Brinks
- DBE Cash Recyclers, Coin Machines
- Myriad of Low Voltage Service Providers

Internal Team

External Team

Operations Team

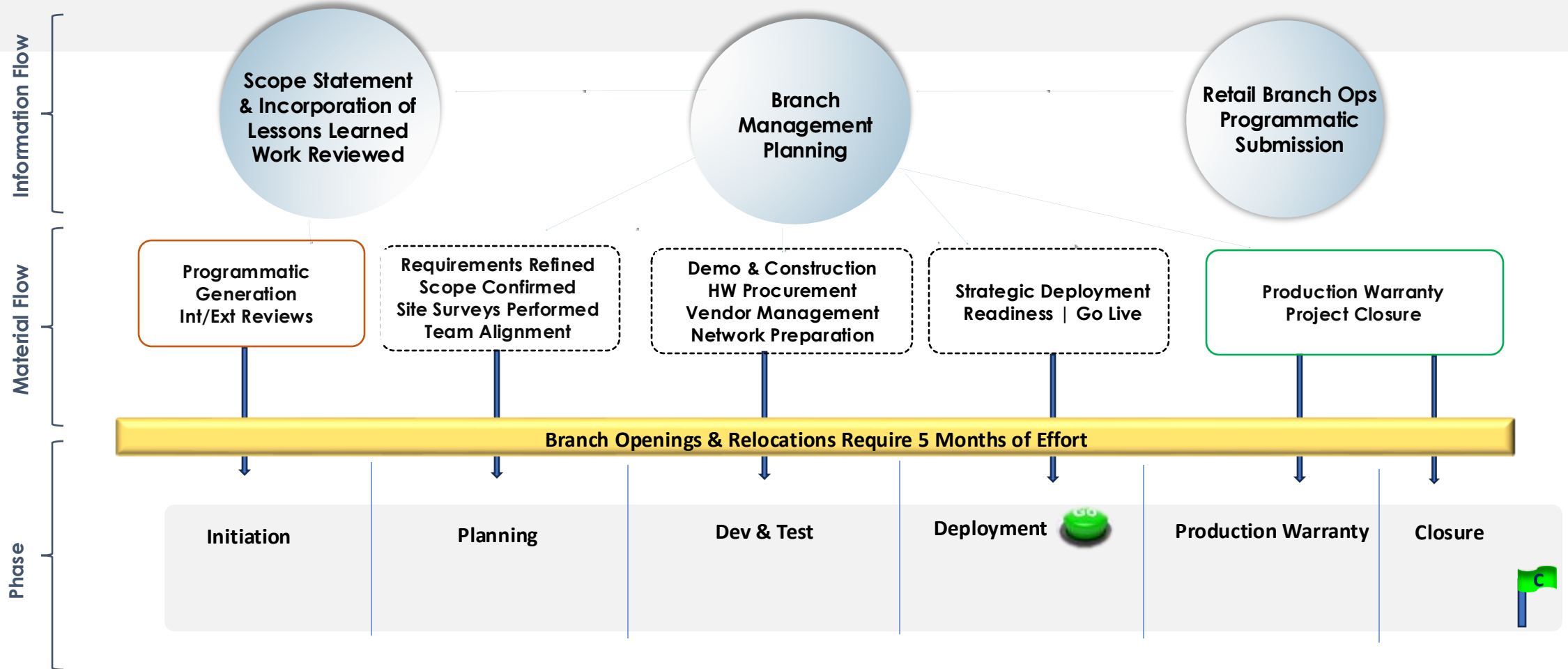
Go Live Implementation Teams



# Branch Management

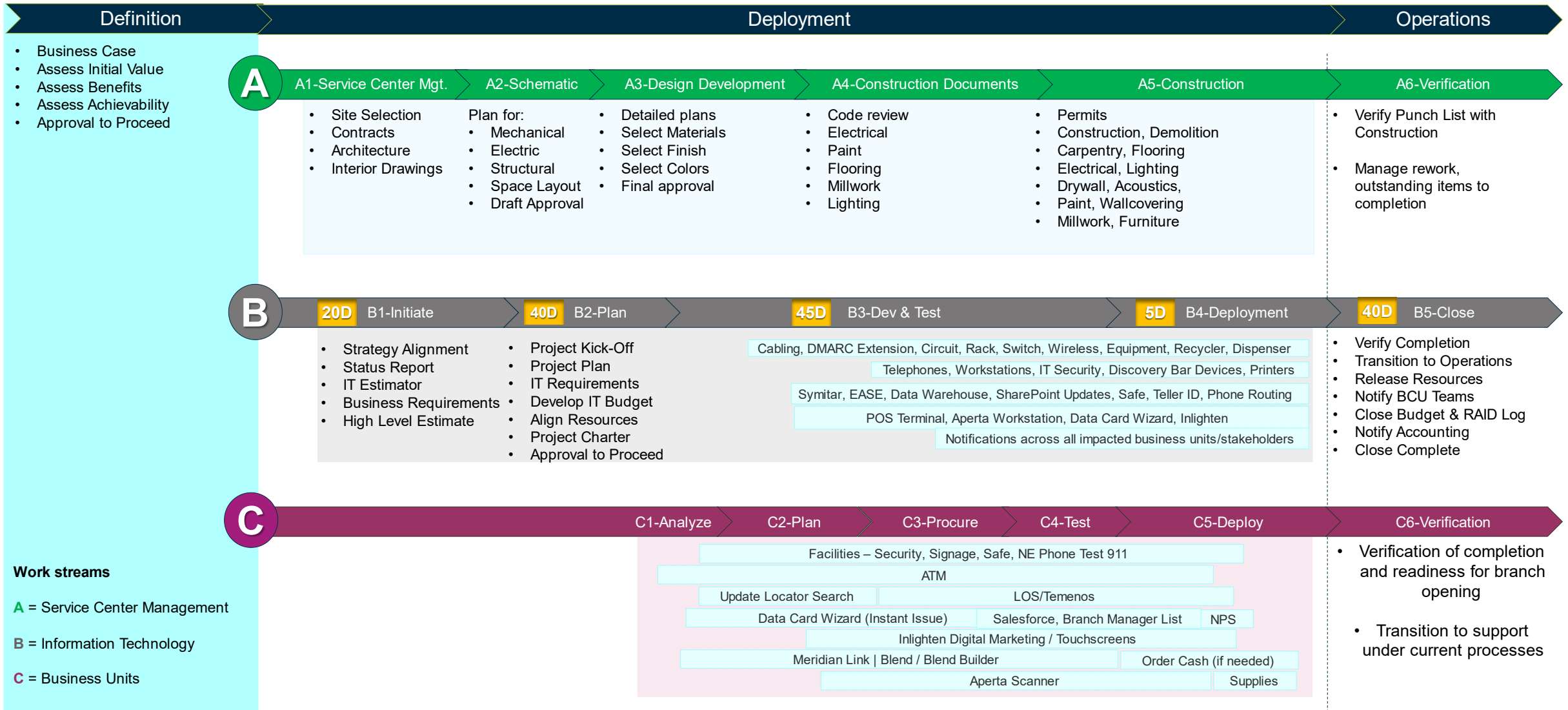
## Branch Opening

A general walk through of the branch delivery process from receipt of the initial Retail Branch Ops team requirements (via a Programmatic) for all project types through Production Warranty.



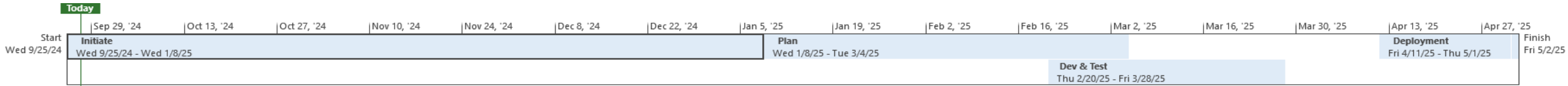
# Branch Management

## Branch Opening



# Branch Management

## Branch Opening



Task Name	Duration	Start	Finish
<b>Initiate</b>	75.45 days	Wed 9/25/24	Wed 1/8/25
Document High Level Business Case	7.75 days	Wed 9/25/24	Fri 10/4/24
Determine Business Requirements	58.45 days	Fri 10/4/24	Thu 12/26/24
Detailed Design & Analysis	1 day	Thu 12/26/24	Fri 12/27/24
Detailed estimate (L3) - Verify Estimator	62 hrs	Fri 12/27/24	Tue 1/7/25
Solution Lockdown	4 hrs	Tue 1/7/25	Wed 1/8/25
<b>Plan</b>	39.5 days	Wed 1/8/25	Tue 3/4/25
Plan Communication Management	21 hrs	Wed 1/8/25	Mon 1/13/25
Plan Risk Management	21 hrs	Mon 1/13/25	Wed 1/15/25
Determine infrastructure	2 hrs	Wed 1/15/25	Wed 1/15/25
Develop schedule (L3)	2 hrs	Wed 1/15/25	Thu 1/16/25
Develop budget (L3) - IT Equipment & Resources	2 hrs	Thu 1/16/25	Thu 1/16/25
Update Portfolio (Delivery Road Map)	0 hrs	Thu 1/16/25	Thu 1/16/25
Baseline Project	200 hrs	Thu 1/16/25	Thu 2/20/25
Assign Project Planning Resources (Allocations)	68 hrs	Thu 2/20/25	Tue 3/4/25
<b>Dev &amp; Test</b>	25.83 days	Thu 2/20/25	Fri 3/28/25
Procure Equipment	56 hrs	Thu 2/20/25	Mon 3/3/25
Prepare Back End Systems, Processes, etc.	36 hrs	Mon 3/3/25	Fri 3/7/25
Setup & Configure Equipment (Lab Test)	114.6 hrs	Fri 3/7/25	Fri 3/28/25
<b>Deployment</b>	13.87 days	Fri 4/11/25	Thu 5/1/25
Install Equipment	9.64 days	Fri 4/11/25	Thu 4/24/25
Update Back End Systems, Processes, etc.	0.48 days	Thu 4/24/25	Fri 4/25/25
Soft Opening	3.75 days	Fri 4/25/25	Thu 5/1/25
<b>Close</b>	1.75 days	Thu 5/1/25	Fri 5/2/25
Gate Review - Verification to Close	2 hrs	Thu 5/1/25	Thu 5/1/25
Initiate system & user support	2 hrs	Thu 5/1/25	Thu 5/1/25
Close out Defects, Risks & Issues	2 hrs	Thu 5/1/25	Thu 5/1/25
Provide Post Implementation Support	2 hrs	Thu 5/1/25	Fri 5/2/25
Conduct Lessons Learned	1 hr	Fri 5/2/25	Fri 5/2/25
Close Project Plan	1 hr	Fri 5/2/25	Fri 5/2/25
Archive Project Artifacts	1 hr	Fri 5/2/25	Fri 5/2/25
Release Project Resources	1 hr	Fri 5/2/25	Fri 5/2/25
Send Project Completion Letter	1 hr	Fri 5/2/25	Fri 5/2/25
Notify cost accounting of closure	1 hr	Fri 5/2/25	Fri 5/2/25

