$1,000,000 Upgrade of Old System Avoided through SQL Server Data Warehouse, SharePoint, Advanced Workflow, Advanced Forms*

$500,000+ in IT and Operations Cost Saved Over Five Years by Providing 70 Solutions to Business Users with No-Code Solutions

Example: 153 Step Process Reduced to 89 Steps in 30 Days

Business Users No Longer Forced to "Just Use Excel to Work Around the Problems in the Old System"

"No-Code Solutions" Prevent Delay, Waiting, Scope Creep, Undefined Requirements, Lack of User Participation, User and Executive Frustration, Cost of Conventional IT Solutions

Process Improvement with No-Code Solutions Tools Including SharePoint, Designer, Nintex Workflows, InfoPath, Nintex Forms, SQL Server Queries, Lookups, Data Warehouse

Documentation, Discipline Avoids Risks of "Run and Gun, Heroes and Firefighter" IT Types

Better, Faster Cheaper

By Tom Ingram, PMP, CMC(e)

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The "Bowling Alley" of No Code Solutions

Letter Create Change

Complaints Tracking

CFPB Audit Readiness, Remediation

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[Legacy Software] Setup

Accounting

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Legal Document Review

Bankruptcy Associate Assignment

Bankruptcy Codes

CFPB Default

Change Control

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Collections Lists Referral

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Employee List

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Fannie History

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Scorecards

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Color Code:

IT

Originations / Sales

Servicing

Bankruptcy / Foreclosure / Loss Mitigation

Compliance

Fannie / Freddie / Ginnie etc.

Servicing System Workaround

Miscellaneous
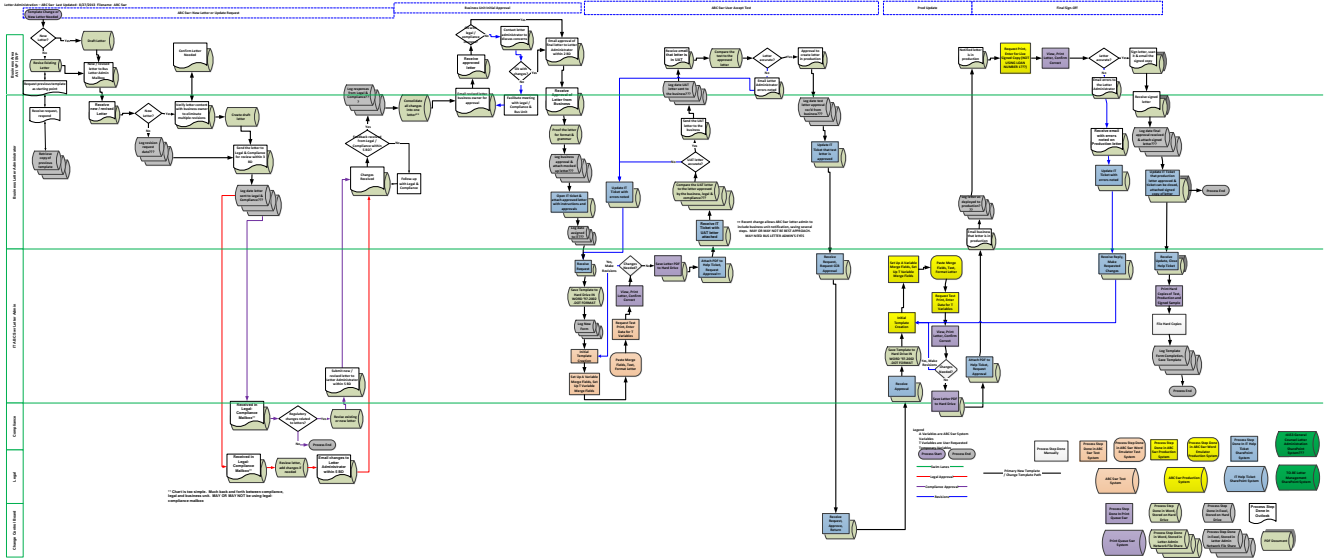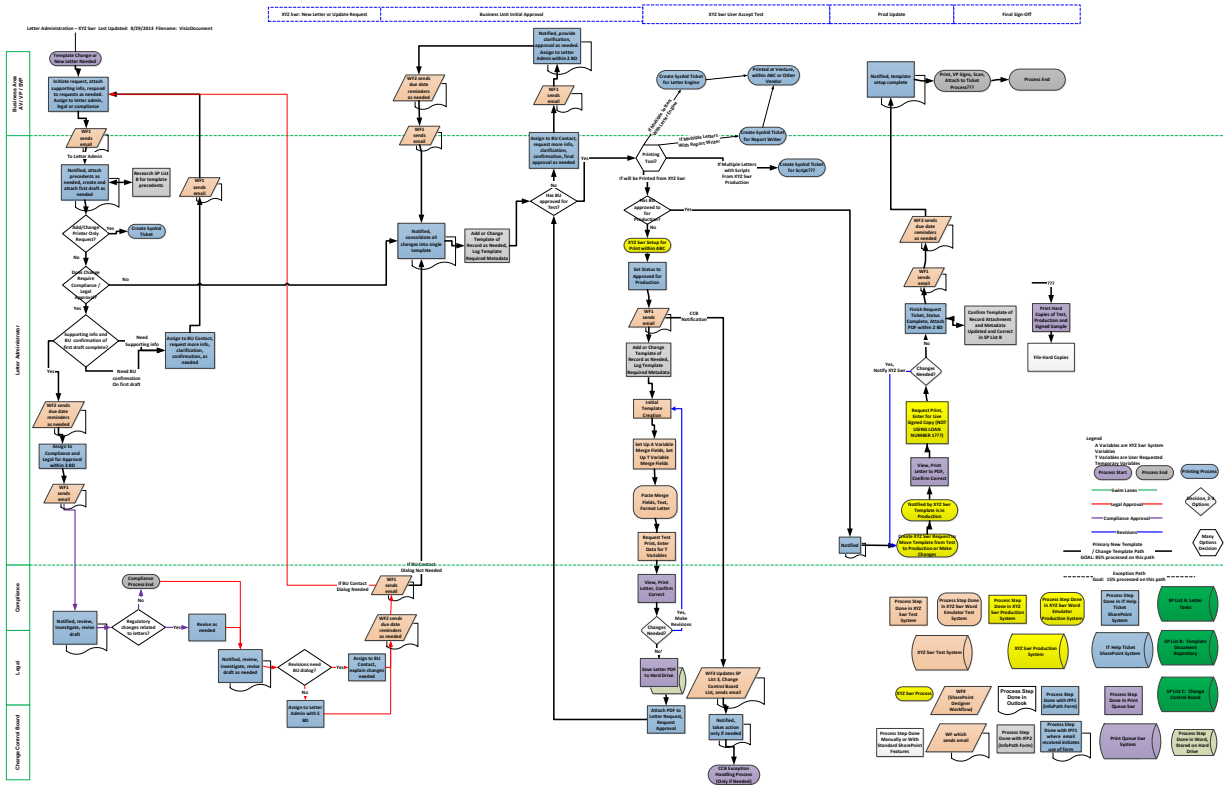
Major No-Code Solutions, Process Before and After, Work Samples:

Letter Creation Approval Production Tracking

- Before Process Chart

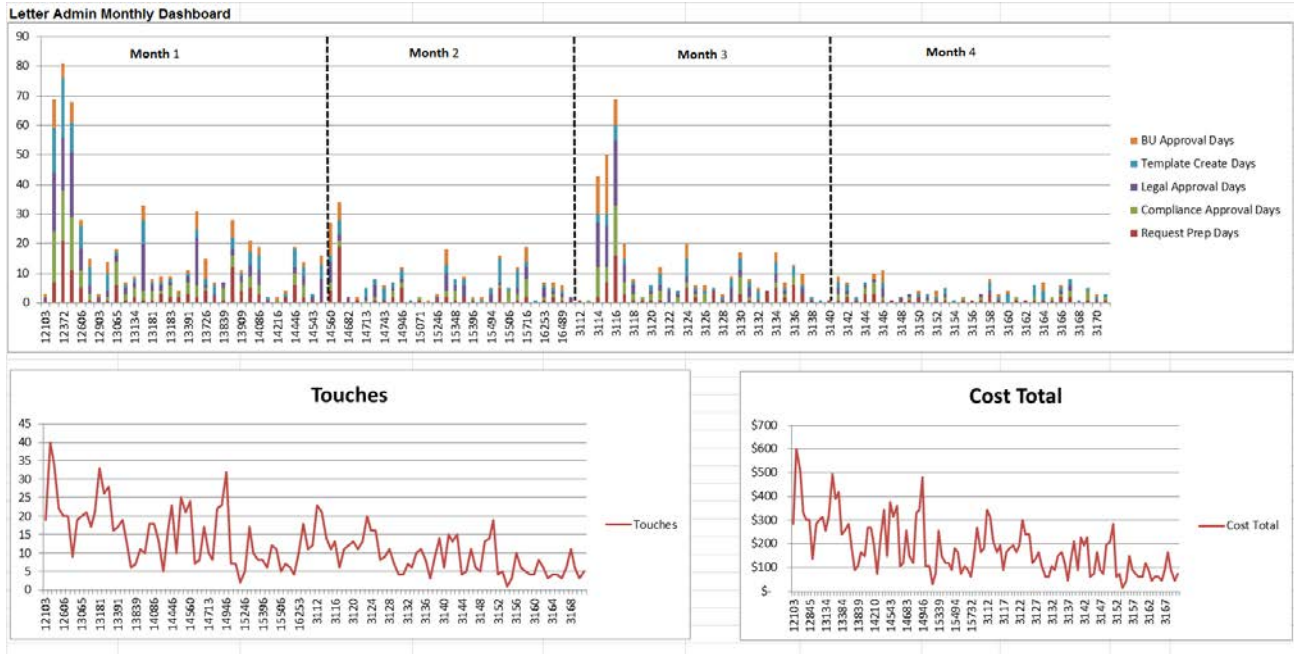- After Process Chart

- Dashboard Showing Reduction in Cost and "Touches" Over Four Months

- Full Application Video and PDF
- Additional Application Details Video and PDF
- InfoPath Form Documentation Video and PDF shows **EXCELLENT TASK TRACKING** among multiple parties

Complaints Tracking Handling
- Full Application SQL Query lookup InfoPath form Video and PDF
- Synchronizing updates from SharePoint to SQL Server Video and PDF
- InfoPath Form Documentation Video and PDF

Audit Readiness, Remediation Task Tracking
- One Page Executive Outcomes Process Chart
- Swimlane Process Flow Master with Workflow Functional Documentation
- Workflow Full Documentation Example
- Test Scripts
- Full Application Video and PDF
- Status Dashboard with Red Green Yellow Lights
- InfoPath Form Documentation Video and PDF

How Cost Savings Were Estimated:

The old system had not been substantially upgraded for over five years due to both cost and lack of enhancements from the software vendor. Software, hardware, IT services, training and business user time costs to switch such a big software package would easily have cost over $1,000,000. This cost is being deferred for multiple years by creating "no-code solutions" to work around the deficiencies of the old system. I worked on three of the advanced no-code solutions, one of which will easily produce $100,000 in savings over five years.   The two other solutions will prevent another $100,000 in regulatory penalties alone. If we assume just $5,000 each in IT and operations cost savings for the other 67 no-code solutions, the total savings exceeds $500,000.

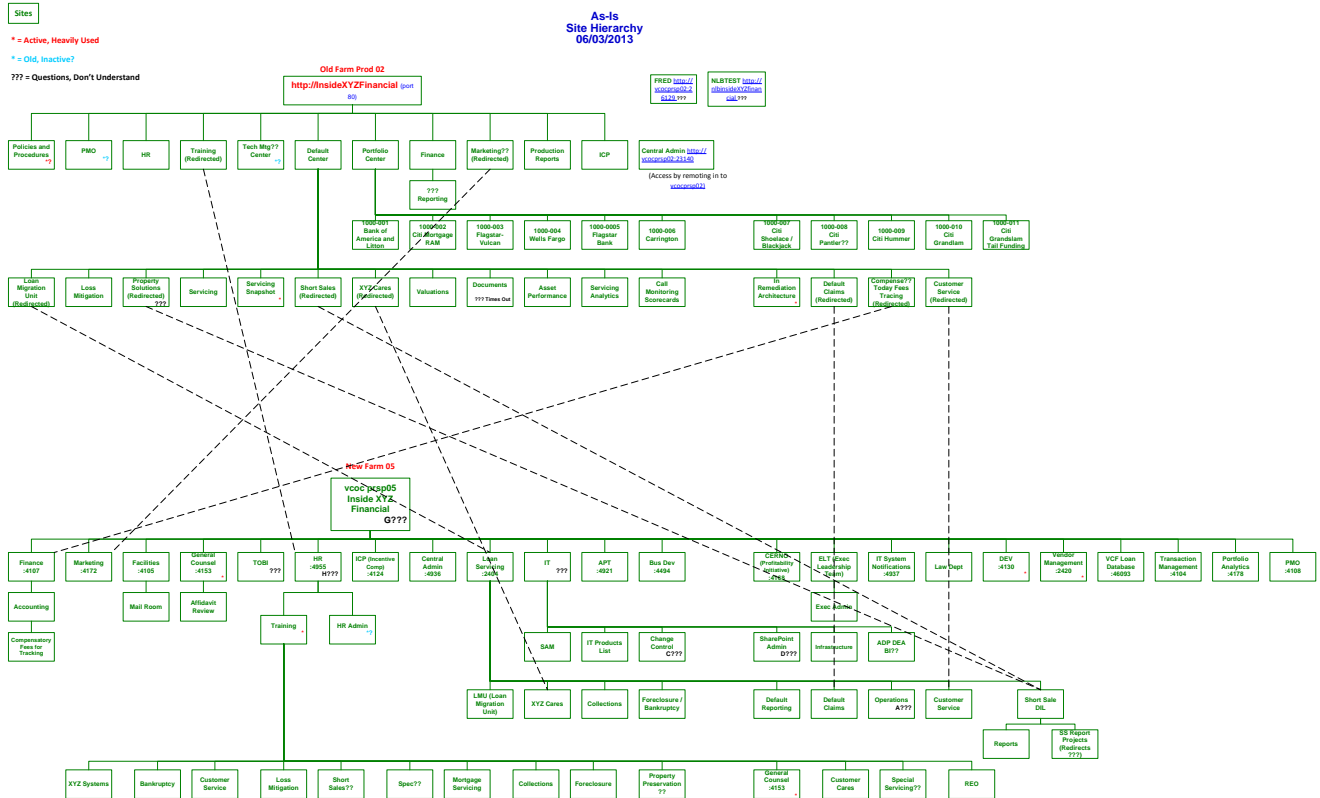## The "No-Code Solutions" Key Principle: "First, Try to Solve the Business Problem with "Excel on Steroids".

I train business users to think of SharePoint as Excel on steroids. By attempting this approach to meet the business need first, several benefits arise:

- **1/3 of business problems will be successfully solved**
- **1/3 will result in defined processes, outcomes and prototypes for more advanced IT solutions**
- **1/3 of requests will go away on their own**
- **Prevents conventional IT problems: Scope creep, "we can program anything", lack of user participation, undefined and continually changing processes, big bang approach to problems, lack of executive sponsor.**
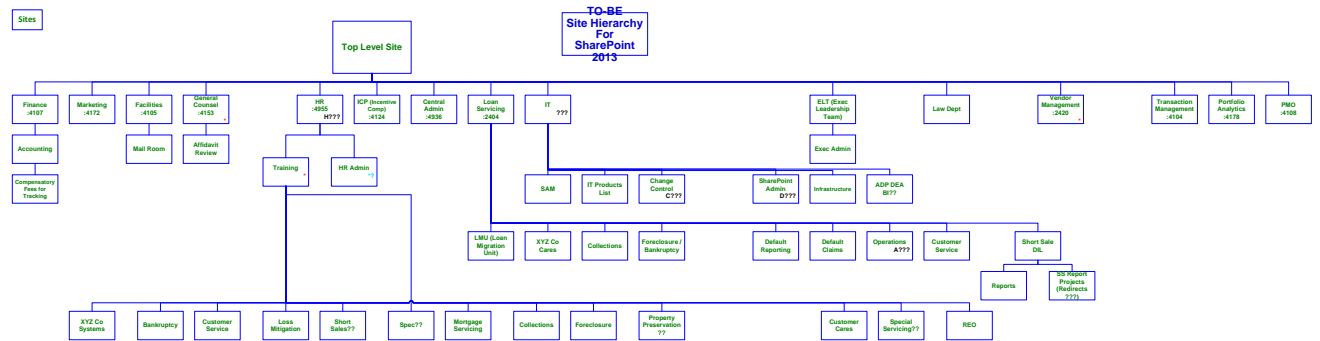
SharePoint Cleanup, Documentation, Migration from 2010 to 2013

Site Hierarchy Before
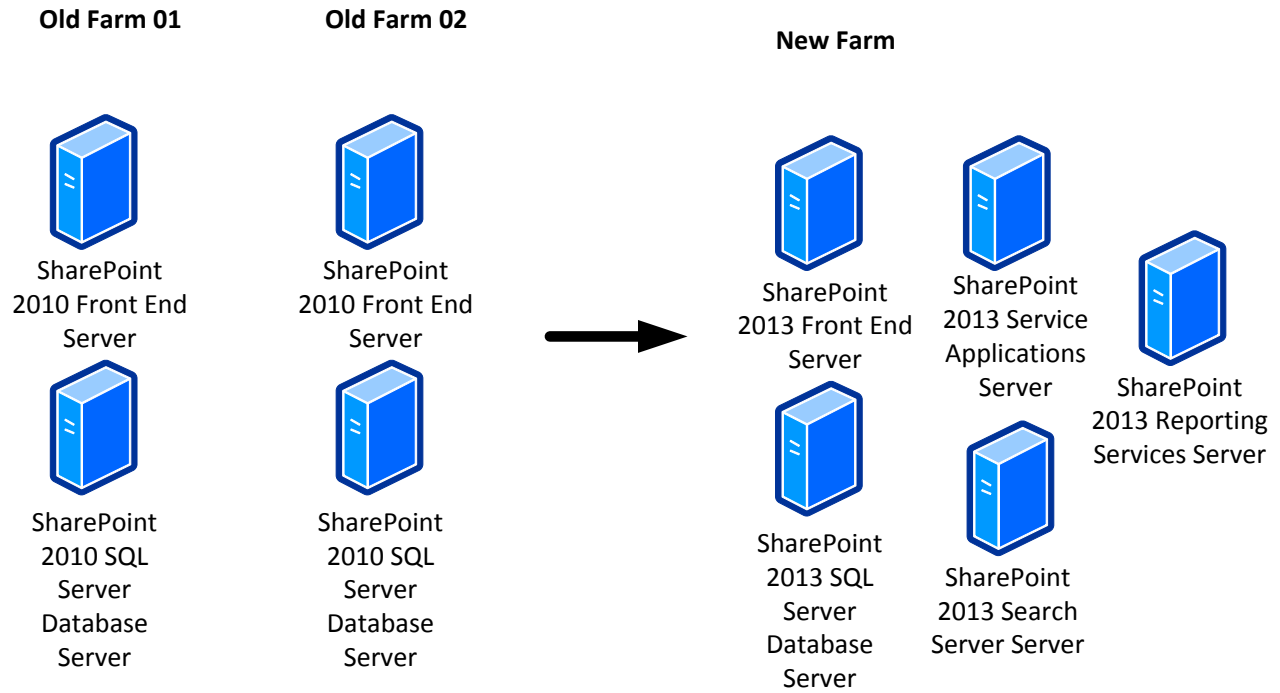

As-Is
Site Hierarchy
06/03/2013

Sites

* = Active, Heavily Used

* = Old, Inactive?

??? = Questions, Don't Understand

Site Hierarchy After

TO-BE
Site Hierarchy
For
SharePoint
2013

Server Farm Configuration, Before and After

Old Farm 01   **Old Farm 02**

New Farm

SharePoint
2010 Front End
Server

SharePoint
2010 Front End
Server

SharePoint
2013 Front End
Server

SharePoint
2013 Service
Applications
Server

SharePoint
2013 Reporting
Services Server

SharePoint
2010 SQL
Server
Database
Server

SharePoint
2010 SQL
Server
Database
Server

SharePoint
2013 SQL
Server
Database
Server

SharePoint
2013 Search
Server Server

Additional Major SharePoint Applications
New Hire Request

Request

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SVP Nar	Add'l En
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Local intranet | Protected M

Review

	Review Type	Current Status	Assigned To	Review #	Date Submitted	Account Number	Last Name	State	Document Name	Executed By	Assigned FC/BK Rep	DateSubmitted1	DateSubmitted2	DateSubr

⊞ **Current Status : Closed** (138)

⊞ **Current Status : No Exception** (6190)

➕ Add new item

Scorecards

Audit Survey Solution

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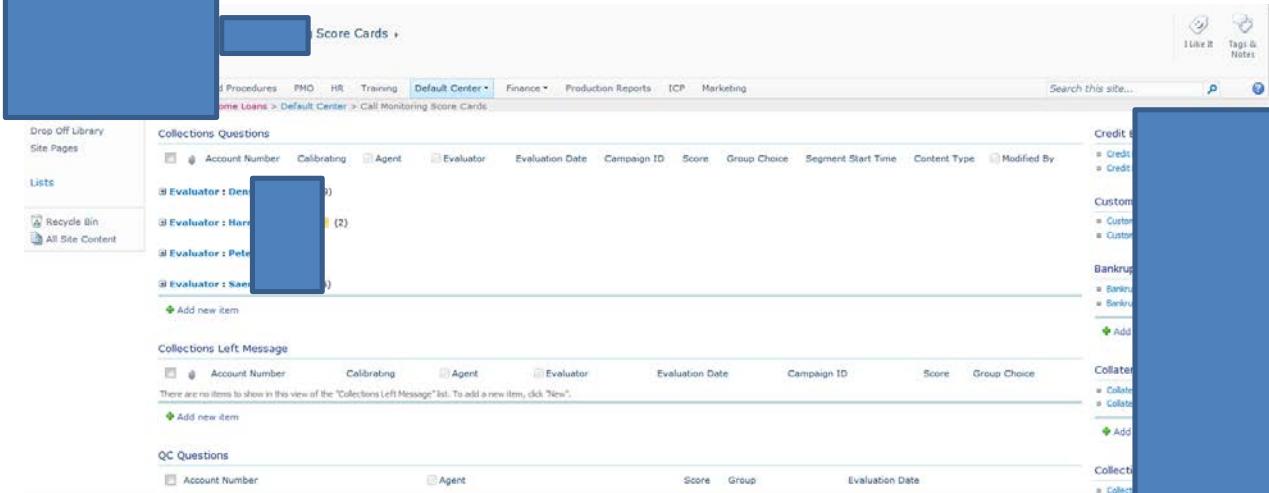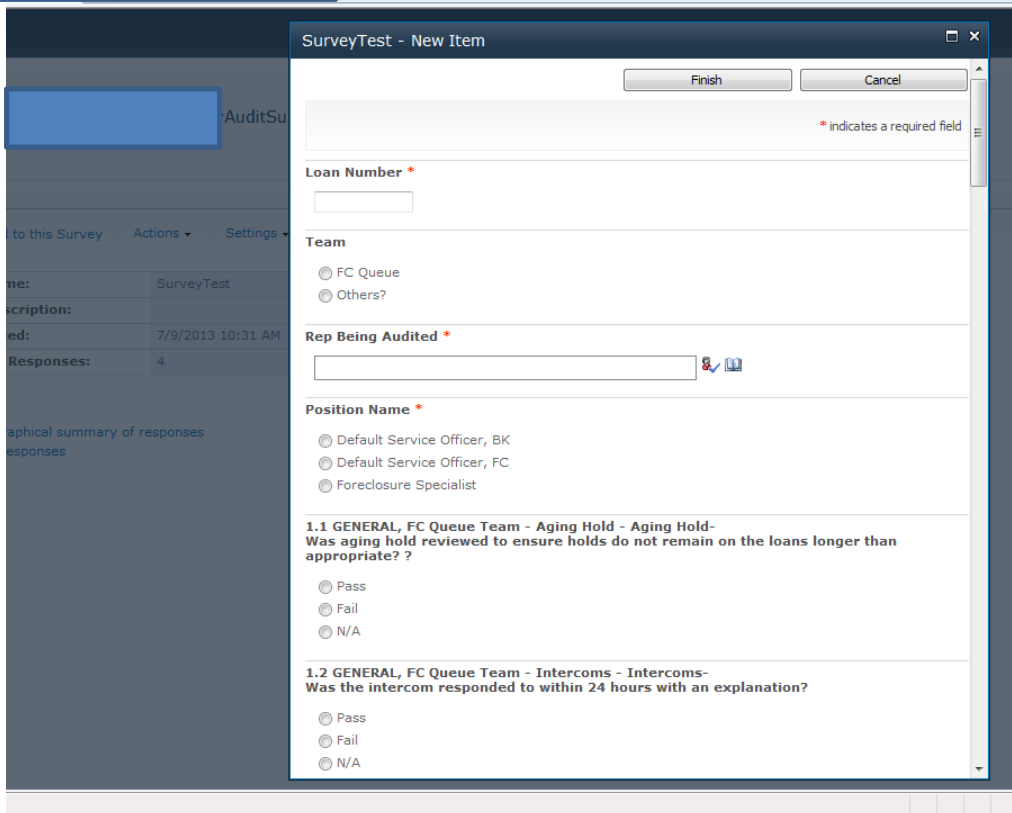
Fees Tracking

Fees Tracking ▸ New Fees ▾

Search this site...

	Created By	Edit	Investor Name	StatementID	Investor Bill Date	Bill Due Date	Business Group	Response Due Date	Investor Loan No	LoanNo	Assessed Fee Amount	EstFee
9:52 PM	Me		Mac	NPL010228201344	2/28/2013	3/31/2013	Foreclosure	3/15/2013	997774673	559	$100.00	
9:51 PM	Me		Mac	NPL010228201344	2/28/2013	3/31/2013	Foreclosure	3/15/2013	511218214	015	$100.00	
2:05 PM	Me		Mac	PL0010228201345	2/28/2013	3/29/2013	Investor Reporting	3/15/2013	PL00213153691		$500.00	
4:11 PM	Me		Mac	TBD	2/28/2013	3/31/2013	Foreclosure	3/15/2013	528420747	820	($540.00)	
1:08 PM	Me		Mac	TBD	2/28/2013	3/31/2013	Foreclosure	3/15/2013	368497690	693	$26,760.00	

Servicing Questions

Loan Number	Where intercoms responded to,within (1) business day?	Did the Rep., resolve the intercom?	Did the Rep., work their assigned work Que's	Where the loans documented properly?	Does the file maintain the correct hold?	Does the hol
980	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable	N/A
980	Not Applicable	Not Applicable	Yes	Yes	Yes	
980	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable	N/A

➕ Add new item

Fee Split

	Edit	Term	FC_DSO	BK_DSO	FC_DSO_Doc	FC_SA_Doc	FC_Doc	BK_Doc	Notary	Title
		00	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	1
		01	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	2
		02	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	3
		03	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	4
		04	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	5
		05	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	6
		06	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	7
		07	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	8
		08	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	9
		09	Kevin	Tai	Nat	Ashl	Osc	Kyle	Asl	10
		10	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	11
		11	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	12
		12	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	13
		13	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	14
		14	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	15
		15	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	16
		16	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	17
		17	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	18
		18	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	19
		19	Kevin	Tai	Nat	Ashl	Bra	Julio	Asl	20