

Banking, Insurance & Financial Services

Product, Project and Portfolio Management



Microsoft



SharePoint

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Project

Microsoft



Power BI

The changing business conditions & technological innovation around the world today is making it necessary for the Banking, Insurance and Financial industry to adopt a systematic way of planning & execution of their business demands. Most activities in the Banking Sector could be done as projects. From the building of New branches, Deployment of Online and Telephone banking, Card services, Risk management, Expand ATM networks, Call center services, Information technology, all the way to banking process improvement, it is imperative for the banks, insurance and financial services organisation to practice best demand, project, program management process and technologies today.

As a result of digital transformation and modernized workplace, successful execution of the plan requires a systematic and integrated solution framework for managing entire demand and project lifecycle from concept to benefits realization.

NDS Global based in US & India is a trusted Microsoft Gold Partner that has successfully provided Demand, Project and Program management solutions to leading banks. Our solution experts team with experience in the project management and banking and financial industry offer a flexible and configurable project management solution with built-in cross-functional work flows involving various phases from demand management, technical and financial feasibility, project planning and execution of projects of various types/sizes and complexity.

For Demo/Workshop:

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Microsoft



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Current Scenario

Some of the key challenges facing banks, insurance and financial sector are the impact of disruptive new technologies, regulation opening up market access, changing consumer preferences globally & payments technology evolving at an unprecedented speed. Contact less cards, online payments, mobile payments, are all becoming more prevalent. Keeping pace with those technologies will require major investment from banks the fact that their new competitors are adopting best practices of demand and project management to act upon the possibilities and opportunities for growth in products or services, processes or technologies. Banks need to respond to the challenges of the new environment and reinvigorate their business models with effective technology, tools and process for optimal efficiency.

Solution

NDS™ Banking, Insurance and Financial Services - Project Management solution, pre - built over Project Online, is the fully integrated Demand, Program and Project life cycle management solution.

The solution comes with flexible workflow and easily configurable attributes for various types of process, projects or programs like:

- Demand Management for Strategies and Initiatives
- Business growth projects for New Products or Services
- Change management for Enhancement of Products or Services
- Business expansion like new ATM or Branch Rollout
- Mandatory projects required for Regulatory Compliance
- Technology projects for operational efficiency and productivity
- Security and Risk project for process improvement and customer value

The solution embraces all the phases from demand initiation, planning, execution, benefit realization and closure. It fully integrates and provides one source of data, tools and facts enabling operational efficiency.



Demand
Management



ATM Rollout



New
Product/Services



Technology
Projects



Product/Services
Enhancements



Regulatory
Compliance



Branch Rollout



Executive
Dashboard

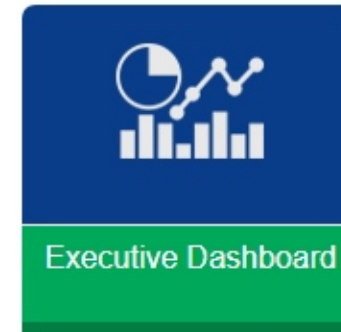
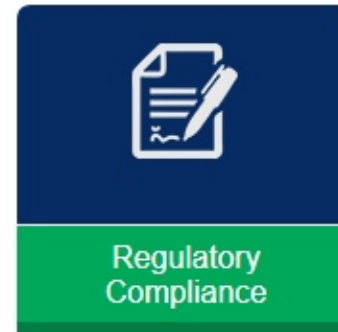
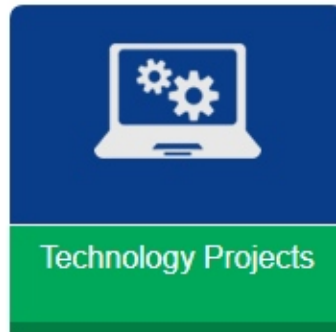
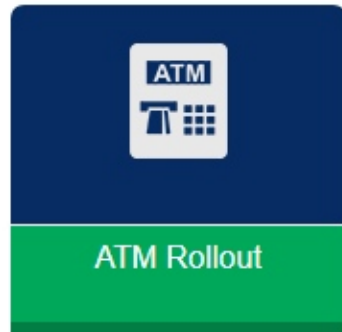
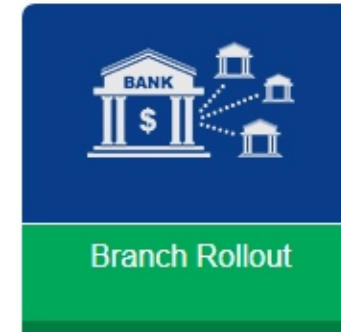
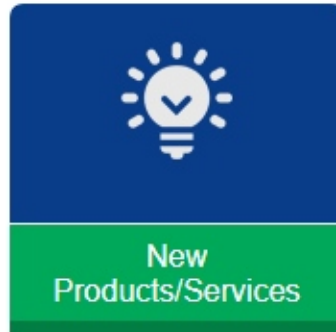
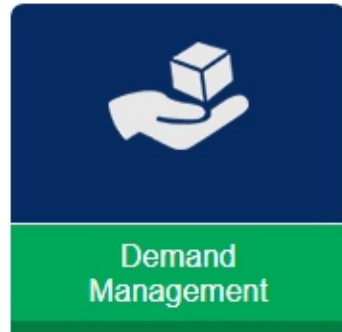
Business Benefits / Outcome

NDS™ Banking, Insurance and Financial Services Project Management solution enables several benefits to a banking industry, which may include:

- Manage demands that help reach competitive advantages and growth as per goals
- Increase in effectiveness of procedures, better delivery timing and quality of project execution
- Effective use of technology in integrating process and data from strategy to execution of demand
- Get insights on project performance year over year and quarter to quarter

The banking project management solution brings industry's best practices in demand and project execution to reach the competitiveness, faster growth and flourish to outperform the competitors by creating improved practices in project management.

Banking Projects & Portfolio



Demand Management



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Demand Management

New Demand

All Demands

Demand Management

Feasibility Check


Impact Assessment

Title	Request Type
New Insurance Policy Implementation	Government Mandate
Demand Details	Target Application
Demand Details	Insurance Application
Classification	Reviewer
Business Growth	Shalaka Jadhav
Department Name	Target Location
Core Banking	Bangalore

New Products & Services

New Products & Services			
New Project	Initiation	<div>Large 0</div> <div>₹ 0</div>	<div>Medium 2</div> <div>₹ 144500</div>
Project			<div>Small 1</div> <div>₹ 15000</div>
Task	Planning	<div>Large 1</div> <div>₹ 4500</div>	<div>Medium 1</div> <div>₹ 0</div>
Risk & Issue			<div>Small 2</div> <div>₹ 374000</div>
Timesheet	Execution	<div>Large 0</div> <div>₹ 0</div>	<div>Medium 2</div> <div>₹ 902311</div>
Resources			<div>Small 1</div> <div>₹ 350000</div>
Dashboard	Benefit Realization	<div>Large 0</div> <div>₹ 0</div>	<div>Medium 1</div> <div>₹ 650400</div>
Setting			<div>Small 1</div> <div>₹ 10000</div>
	Closure	<div>Large 1</div> <div>₹ 3450000</div>	<div>Medium 0</div> <div>₹ 0</div>
			<div>Small 1</div> <div>₹ 12000</div>
	Risk & Issues	<div>Risk 3</div>	<div>Issues 1</div>

ATM Rollout Process

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ATM Rollout - Bangalore

Initiation

Planning

Execution

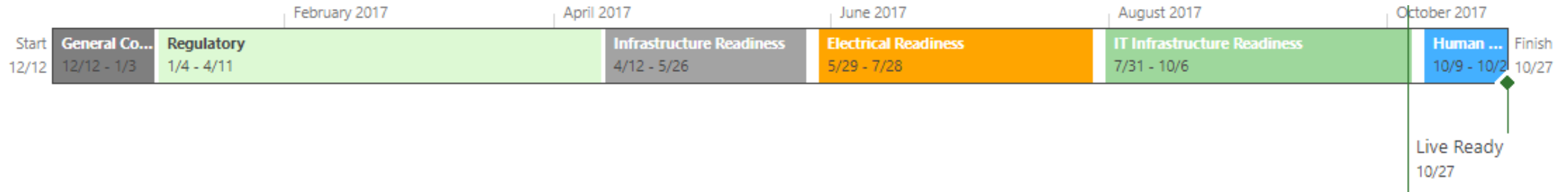
Benefit Realization

Closure

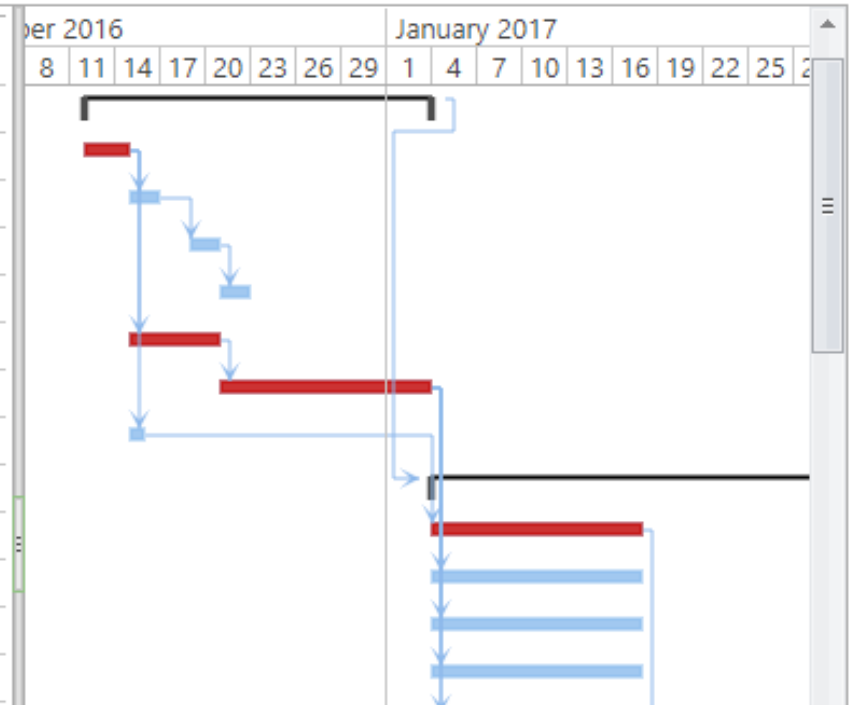
Current Stage : Scoping

Schedule	Demand Initiation	Feasibility Check	Impact Assessment	Approval	RACI	Milestone/RAID	Benefits Realization	Closure
ATM Rollout								
New Project	Title *					Request Type		
Projects	ATM Roll Out - Bangalore					Business Requirement		
Tasks	Demand Details					Target Application		
Risks & Issues	ATM Roll Out - Bangalore					NA		
Timesheet	Classification					Reviewer *		
Dashboard	Business Growth					Mayuri Pawar x		
Settings	Department Name *					Target Location		
	Select					Bangalore		
	Requester *					Document Upload		
	Hitesh Patel x					<div>Choose FileNo file chosen</div>		

Branch Rollout Schedule



	ID ↑	Mode	Task Name	Start	Finish
	1	→	General Conditions	12/12/2016	1/3/2017
	2	→	Receive notice to proceed and sign contract	12/12/2016	12/14/2016
	3	→	Submit bond and insurance documents	12/15/2016	12/16/2016
	4	→	Prepare and submit project schedule	12/19/2016	12/20/2016
	5	→	Prepare and submit schedule of values	12/21/2016	12/22/2016
	6	→	Obtain building permits	12/15/2016	12/20/2016
	7	→	Submit preliminary shop drawings	12/21/2016	1/3/2017
	8	→	Submit monthly requests for payment	12/15/2016	12/15/2016
	9	→	Regulatory	1/4/2017	4/11/2017
	10	→	Submit shop drawings and order long lead items -	1/4/2017	1/17/2017
	11	→	Submit shop drawings and order long lead items -	1/4/2017	1/17/2017
	12	→	Submit shop drawings and order long lead items -	1/4/2017	1/17/2017
	13	→	Submit shop drawings and order long lead items -	1/4/2017	1/17/2017



PMO Dashboard

Classification

All

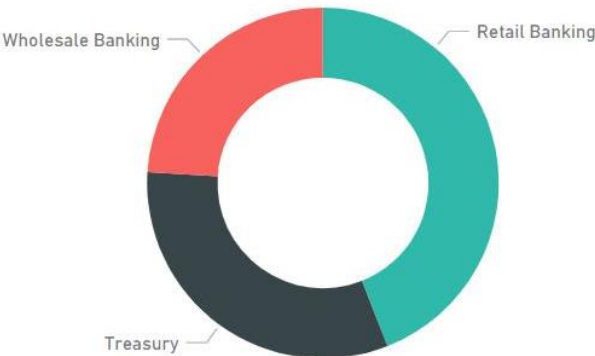
Projects Per Classification



Customer Segment

All

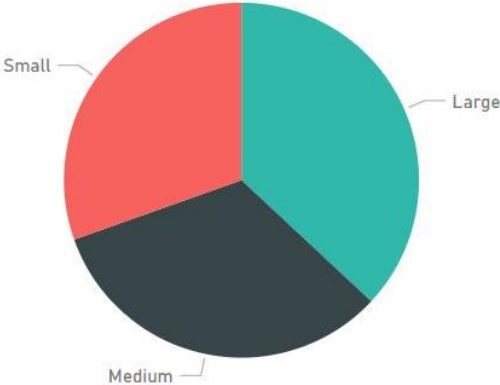
Projects Per Segment



Project Size

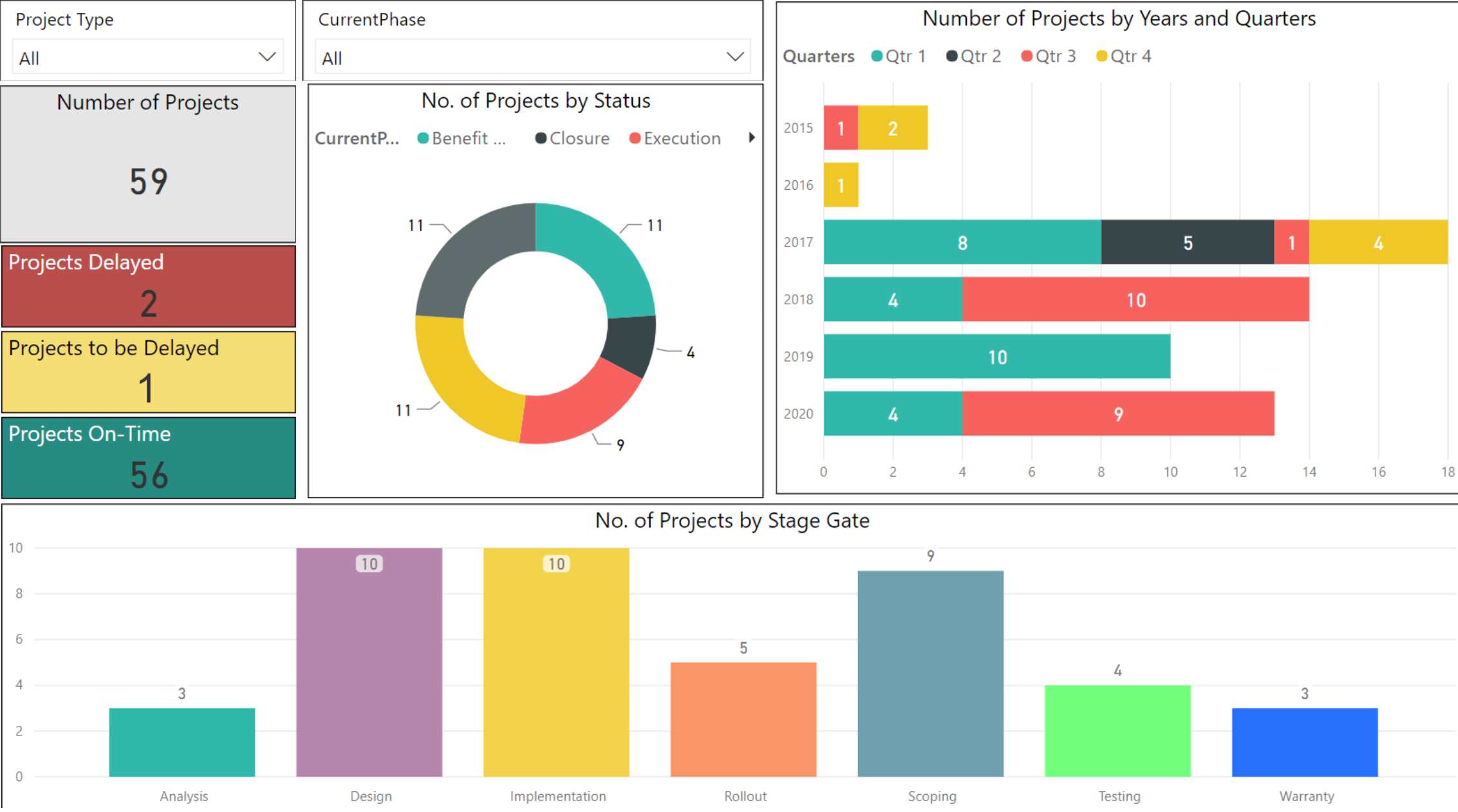
All

Projects Per Size



Project Name	Classification	Segment	Project Size	Finish Date	Duration	Revenue	Estimated Cost	Project Segment	Project Manager
New ATM Machine	Security and Risk		Medium	9/21/2018	2,032.00		900,000.00		Mayuri Pawar
New Indurance Scheme	Business Growth	Treasury	Small	2/5/2018	766.00	7,432,083.00	12,000.00	Treasury.Debt Securities	Mayuri Pawar
New IT Project Management Implementation	Operational Efficiency	Wholesale Banking	Medium	6/20/2017	766.00	237,911.00	45,000.00	Wholesale Banking.Term Loans	Mayuri Pawar
Platform Tech Rollout	Operational Efficiency	Treasury	Small	1/19/2017	986.00	123,000.00	350,000.00	Treasury.Equities	Mayuri Pawar
Smart Card Implementation	Business Growth		Small	9/21/2018	2,032.00	875,000.00	373,000.00		Mayuri Pawar
Web Portal - Consumers	Operational Efficiency	Treasury	Large	1/23/2017	766.00	540,022.00	4,500.00	Treasury.Foreign Exchange	Mayuri Pawar
New HR Policy	Business Growth	Treasury	Medium	2/5/2018	766.00	5,432,216.00	2,311.00	Retail Banking.Deposit Products	Pooja Patil
ATM Roll out - Bangalore	Business Growth	Wholesale Banking	Small	10/27/2017	1,840.00	1,212,423.00	124,500.00	Wholesale Banking.Working Capital	Rishikesh Mishal
ATM Roll out - Mumbai	Business Growth	Wholesale Banking	Medium	10/27/2017	1,840.00	7,694.00	25,000.00	Wholesale Banking.Term Loans	Rishikesh Mishal
Branch roll our-India	Business Growth	Treasury	Large	1/31/2017	766.00	1,235,796.00	12,000.00	Treasury.Debt Securities	SajidAli Momin
IT Support Enhancement	Operational Efficiency		Medium	9/13/2018	2,032.00	123,456.00	1,000.00		Shalaka Jadhav
AP Rural ATM Rollout	Business Growth			1/25/2019	2,744.00				Shrikrushna Zambhani
Gujarat Arhan ATM Rollout	Business Growth			1/25/2019	2,744.00	4,100,000.00	2,500,000.00		Shrikrushna Zambhani

Stage Gate Status



No. of Projects by Status

CurrentP...

Benefit ...

Closure

Execution



Status	Count
Benefit ...	11
Closure	4
Execution	9

Number of Projects by Years and Quarters

Quarters

Qtr 1

Qtr 2

Qtr 3

Qtr 4



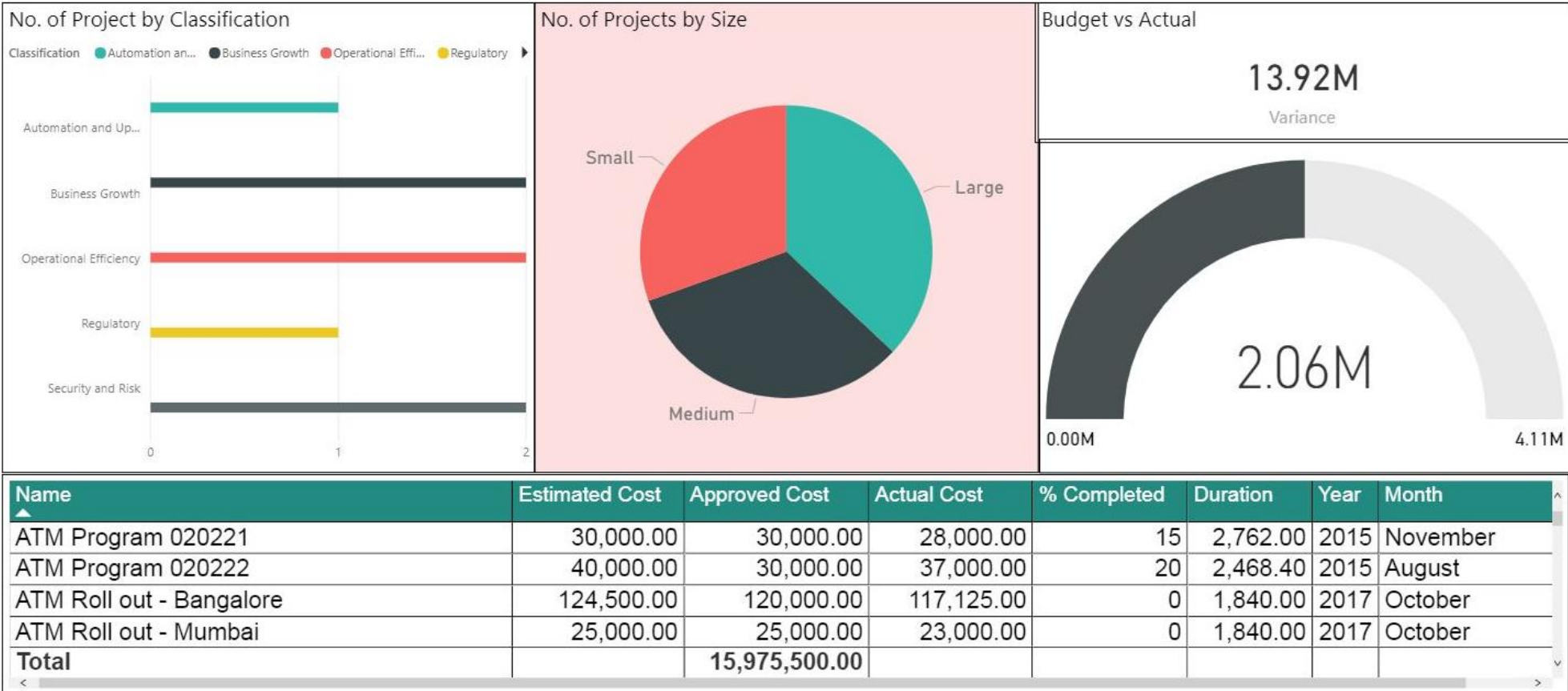
Year	Qtr 1	Qtr 2	Qtr 3	Qtr 4
2015	0	0	1	2
2016	0	0	0	1
2017	8	5	1	4
2018	4	0	10	0
2019	10	0	0	0
2020	4	0	9	0

No. of Projects by Stage Gate



Stage Gate	Count
Analysis	3
Design	10
Implementation	10
Rollout	5
Scoping	9
Testing	4
Warranty	3

Project Summary



Count of ProjectId and Count of ProjectId by TargetLocation

