



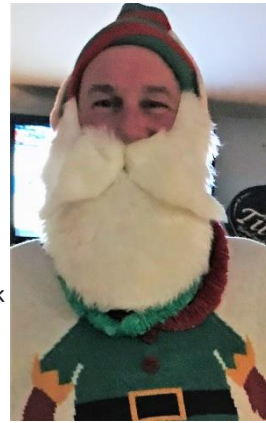
President's Message

In this issue:

- President's Message (p.1)
- Associate Update (p.1)
- Organizational Readiness (p.2)
- Collaboration and Innovation (p.2)
- Business Continuity (p.3)
- WEglobal Celebration (p.4)

Happy Holidays to all of our consultants, associates, clients, partners and friends! We at BD Consulting Group have had a lot to be thankful for this year and that all starts with the relationship and success we've shared with you over the years! I personally look forward to a wonderful Christmas with my family and to a great New Year with all of you in 2020!

In this year's Holiday Newsletter, we are recognizing and 'welcoming back some old friends' who we are once again working with this year. What a treat for me to be able to visit our projects, turn the corner and run into Rick, Barb, Pat, Renee or many others who I've had the pleasure of working with for many years.



Bob DeLeeuw

And speaking of 'old friends', please enjoy the WEglobal Celebration summary where I talk about re-connecting with Levent and Gaye Erkan, who we hired back in the mid-1990's and who are now 'all grown up' in their roles leading this multi-national consulting firm! I could not be prouder of what they have accomplished and of the fabulous, caring people they have become!

Other topics we cover include Organizational Readiness, Collaboration & Innovation and Business Continuity. Happy reading and hope you enjoy! Looking forward to connecting with everyone in the New Year! Happy Holidays!

Associate Update -Welcome Back to Old Friends!!!!

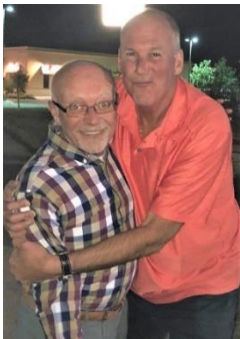
by Barb McConnell

Welcome Back!!! BD Consulting Group has long been known for our focus on relationships --- with our consultants and with our clients. Many of the consultants working for us in 2019 are long service associates or former employees/contractors --- quite a testament to long-standing relationships with our folks. And another handful have joined our client organizations as fulltime employees.

Long service associates like **Greg Cook** and **Ed Ofcharsky** continue to be key contributors to our success and both add value in client relationship roles as well. Some former associates, like **Rick Kane**, **Janice Craig** and **Barb Regan** were key contributors to our firm's foundation back in our DeLeeuw Associates days. Key contributors and leaders back then, Rick and Barb are now serving in key team leader roles and Janice took on a solo senior role this year with one of our new clients. **D'Shone Swiney** also returns from days with both DeLeeuw Associates and our early BDCG days. We are excited to have all of these talented people back on our team.

In addition, we have been able to leverage the skills and experience of many other returning BDCG friends this year. Former associates, **Pat Crowley** and **Roderick Wilkins** returned this year to support one of our favorite clients and that work will hopefully lead to more in the near future. Also returning from our earlier days as BD Consulting Group where they worked multiple engagements, **Paul Ungrady**, **Ryan Shaffer**, **Bryant Campbell**, **Renee Carrington**, and **Bob Clark** are all back once again and returning from more recent engagements are **Sanjay Sharma** and **Muni Sirigireddy**. BDCG's success is built upon the value these talented people provide to our clients every day.

Lastly, our client value is evident in the number of our people that the client hired away from us. This year, several very talented consultants were hired by our clients. After performing well in their engagements, **Jennifer Doherty**, **Tim Henson** and **Kedar Khanvilkar** joined Bank of America this year and **Helen Noles** joined Citizens Bank. We will miss Jenn, Tim, Kedar and Helen and wish them well!



Bob and Rick Kane



Organizational Readiness Paves the Way for Success

by Bob DeLeeuw

BD Consulting Group's foundation was built upon the process engineering and integration work that formed the company back in the early 90's. BD Consulting has since participated in many large-scale, high profile merger, acquisition and integration projects and has built deep functional, process and technical expertise. Along the way, we have found that Organizational Readiness is a key foundational component to the success of any transition. *In a nutshell, if an **organization** is committed to ensuring success in any transition program, it must invest in making sure it is **ready** for any kind of transition.*

Organizational Readiness – Key Focus Areas

Transition Execution Governance

Implements oversight and control processes and oversees integration efforts.

Project Management Office / Transition Management Office

Facilitates integration process by providing required tools and templates; supports project reporting and logistics.

Operational Readiness

Recognizes the “readiness” of the processes, employees and systems to assimilate and adopt all scheduled changes.

Key Indicators

Provides a broad range of measures of the stability of processes, financials, customer reactions and employee readiness.

Brand Management

Manages the media response during the process of transition.

Impact Analysis

Assesses the impact of transition related decisions to identify customer, employee, financial and business risk.

Control Room

Serves as the central command and communications point for all major integration events.

Mock Events / Dress Rehearsals

Establishes a test environment that replicates the production environment to execute conversions and validate processes.

Contingency Planning

Addresses identified risks and prepares for events that could impact the quality and/or timing of the transition.

Rapid Action Teams

Quickly address impacts before, during and after conversion to prepare, respond to and address issues.

Collaboration & Innovation – Project Management Skills or Cultural Values - or Both?

by Michelle Shapiro

Businesses today are transforming to meet the demands of today's competitive landscape. Projects and programs are complex, varied, and critical to business success. Execution of these programs require a multitude of methodologies and processes that are continually being adapted to meet challenging business demands, including accelerated execution time and maximized return on investment. Today's successful Project Managers demonstrate innovation and collaboration to navigate complex matrix environments, changing or hybrid methodologies, and evolving processes. While most organizations are implementing some form of Agile or Scrum methodologies and others are customizing a blend between Waterfall and Agile - commonly referred to as *Wagile* - the need for innovation and collaboration is paramount.

Many organizations highlight innovation and collaboration as core corporate values and we see these skills as required attributes in project management role descriptions. Collaboration is required in today's transforming workplace, demanding superior listening and facilitation skills, demonstrating empathy and being comfortable with feedback. Innovation is valued in the financial services industry as a means to survive the emergence of FinTech and other business pressures. Much like collaboration, innovation is a skill successful project managers leverage as they define, manage and execute projects. Successful consultants focus on being open, collaborative and listening carefully for that sometimes subtle and unexpected opportunity that provides an innovative advantage for the client.

BDCG consultants leverage decades of experience in successful collaboration and innovation to deliver results and develop strong relationships with their immediate and extended teams - so much so that it is not infrequent that our consultants are asked to join the client as an employee when their contract is completed. Collaboration and innovation are truly part of our corporate DNA at BD Consulting Group.

Business Continuity: The Road to Resilience

by Greg Cook

It's that season again, a time when top 10 (or whatever the number) lists abound. Undoubtedly, "business disruptions" will be atop most business risk lists for 2020. After all, business disruptions caused by technology failures, cyber-attacks, data breaches, natural disasters, or the like have regularly topped these lists for the last decade, at least.

And one need not bother checking these lists because many of us have felt the impact of business disruptions in our everyday lives. An airline can't check-in passengers; a bank's customers are unable to access funds; a cloud-based application is unavailable—all these have made news headlines in the past year, raising eyebrows at the extent these major outages can impact B2B and retail transactions.

Responding to business disruption risk is a key corporate competency and has evolved over the last two decades. *Disaster recovery programs* (solely focused on IT) became *business continuity programs* (aimed at critical business services), and now the designation enterprise or organizational "*resilience*" is gaining a decent foothold. But what does *resilience* really mean? And how can an organization make the journey to a resiliency framework?

Resilience is the ability to prevent, mitigate, withstand, and recover from the impacts of business disruptions.

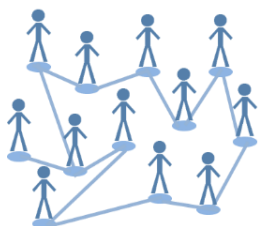
This broader interpretation requires organizations to not only respond to disruptions but establish business routines that detect and prevent disruptions, where possible. In the past three years, regulatory and standards entities (such as FINRA, FFIEC, AICPA, SEC, and ISO) have revised old guidance and in some cases, established new guidelines, primarily designed to operationalize the emerging body of knowledge around resiliency.

The implementation is more exacting and rigorous, establishing resilience as management discipline. Merely having a data or service center recovery site, for example, no longer suffices—organizations must carry out control and monitoring activities as well as engage third (and sometimes fourth) parties in their core resiliency practices.

More than ever, an organization's resiliency framework directly intersects with its other internal control systems (e.g., risk management, data governance, information security). Leveraging the common building blocks amongst these systems can improve the quality of resiliency efforts and reduce maintenance and oversight costs.

For instance, if business processes or applications are catalogued as part of a risk management or information security effort, those same catalogues can be used as the foundation for resiliency routines. Or, if a risk assessment tool is used with a third party oversight program, that same tool is effectively utilized in resiliency procedures.

Designing and implementing an independent (i.e., siloed) resiliency framework too often leads to undesirable outcomes: action plans that are difficult to communicate, limited front-line awareness and ownership, duplicate control testing and third-party reviews. Instead, create an integrated framework that leverages the strengths in other areas of the organization. Doing so will enhance the strategic value of resiliency frameworks and better position the organization to meet heightened consumer and regulatory expectations.



Resilience
~~Business~~
~~Continuity~~
Plan



For additional information,
contact:
Greg Cook at gcook@bdcg.org
or call 973-513-9300

WEglobal Celebration

WEglobal names Bob DeLeeuw Honorary President of its Advisory Board



Bob with Gaye and Levent Erkan

WEglobal is a multinational consulting firm dedicated to “Bringing to our work the humanity, skills and behaviors needed to deliver change effectively and fairly and using the latest technologies to reach out to whole communities, sectors and countries with development solutions.” WEglobal’s Chairman, Levent Erkan, got his start in the consulting business with DeLeeuw Associates back in the 90s. Levent, and his wife, Gaye, worked for DeLeeuw for eight years on large integration and transformation efforts here in the states before returning to Turkey to raise a family.

In 2003 Levent, with Bob’s support, started up DeLeeuw International in Turkey which was later acquired by WYG UK. After leadership roles at WYG and later at MicroSoft, Levent and his talented team launched WEglobal and called once again on his friend Bob DeLeeuw, to play a part in this new venture.

Bob was appointed to the WEglobal Advisory Board as Honorary President where he continues to support Levent and his team with advice and friendship. Bob was honored to join WEglobal in Turkey last month for their “365 Days With WEglobal Event” to celebrate their one-year anniversary as WEglobal. Bob toasted the WEglobal team in celebrating their accomplishments to date, exclaiming “I am truly impressed with WEglobal’s success and ambitions and am excited to witness a young global company becoming more visible by the day.”

Bob believes WEglobal’s success is due to a team dedicated and passionate about making a difference in our world, driven by optimism, energy and innovation. He was truly excited to spend time with such talented and caring professionals during his recent visit and is proud to be part of the WEglobal mission.

For more information on WEglobal, please visit their website (www.weglobal.org).



Levent Erkan, WEglobal Chairperson



Bob with his WEglobal Friends



Bob with Levent Erkan and Luca Azzoni

*From our BDCG Family to yours, we wish you a joyous holiday season
and a happy and healthy 2020!!*

