



Keys to Success Multifamily Business Flow

October 2019

Agency Convergence of IT - BTS

- IT is an integral part of the Strategic Plan and mission of Minnesota Housing Finance - BTS
- IT staff become integrated into the business units – IT Business Partners
- Creating a technology vision for the future
- Creating a strategic roadmap for a digital transformation

Key Component for Success

- Customer journey mapping for inside out/outside in approach
- Data Strategy for strategic alignment and visualizations
- Technology roadmap with key enterprise utilities for success
- Key organizational decision making structures
 - BTIC
 - Operations
 - Divisional Operation
- Responsive team design – IT Structure

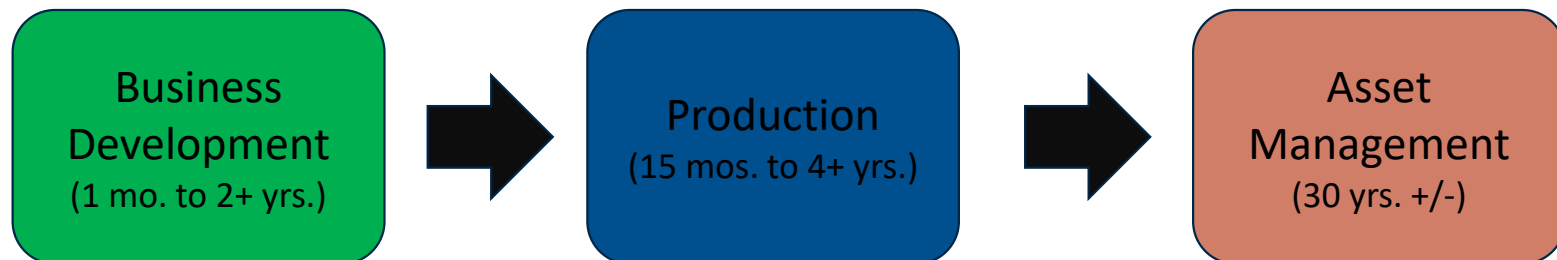
Project Overview – MultiFamily Business Flow

- Vision, values, methods, obstacles, and measures
- Multifamily Customer Portal
- Change management

Business Opportunities

- Lack of transparency
- No centralized space to track status, docs, and activities through full lifecycle
- Standardization of work across projects/properties
- Lack of access to valuable data

Provides transparency into WHAT and HOW work gets completed by the division, teams, and individuals by creating a framework that looks across the FULL lifecycle of Minnesota Housing's portfolio.



- Identify patterns and streamline work
- Continue to improve the user experience
- Clarify staff roles and responsibilities
- Allow for highly informed, data-driven decision making

- Standardized Phases, Stages, Milestones, and Benchmarks
- Pinpoint gaps for process improvement work
- Integration of and access to important data!
- Established champions to ensure success

Obstacles

- Fear of change or loss of control
- Fear of transparency and standardization
- Changing work habits
- Resource constraints








- Real-time access to the status and remaining activities of our entire portfolio
- Ability to track processing times by phase, stage, and activity
- Clarified staff roles and responsibilities
- Improved communication between staff and systems

Full Lifecycle

App Launcher

Search apps or items...

▼ All Apps

-  **Business Development**
Use this App for managing all types of business d... ⓘ
-  **Production**
Use this app to work with projects.
-  **Asset Management**
Use this App for managing the Asset Mgmt. and Com... ⓘ
-  **Scrum Project Management**
Project management tool
-  **Multifamily Customer Portal**
Community supporting developer funding application.

Business Development: Business Leads

Business Development
LD-00000

+ Follow Edit Delete Clone

Details Files Notes History

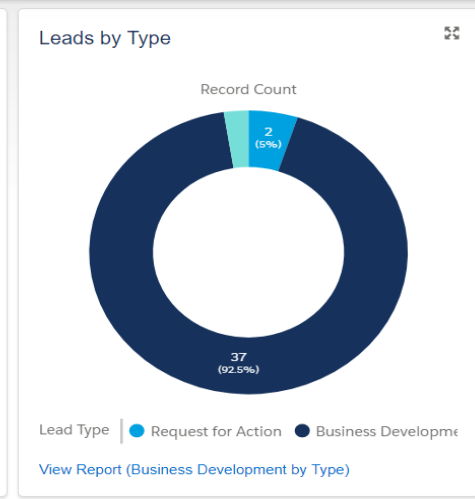
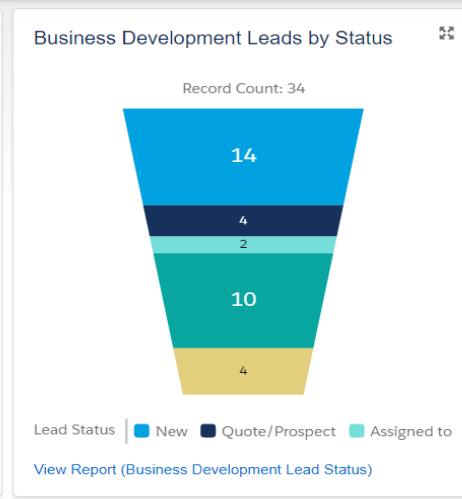
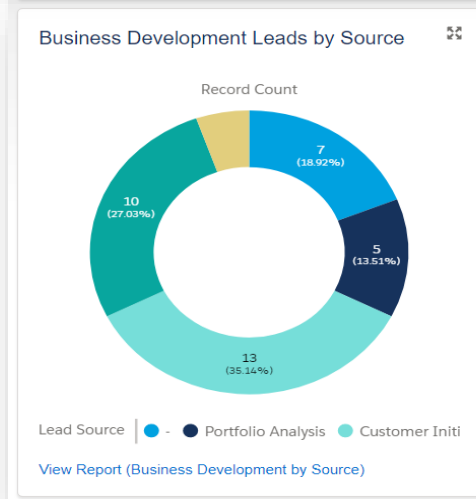
Business Lead ID	LD-00000	Tax Credit Types	NA
Assigned User		Anticipated Agency Loan Type	LMIR
Property	Rolling Ridge Townhomes	Anticipated Agency Loan Amount	\$1,400,000
Lead Type	Business Development	Anticipated Agency Def Loan Source	
Lead Source	Portfolio Analysis	Anticipated Agency Def Loan Amt	
Activity Type	Refi/Moderate Rehab	External Lender Source	
Lead Status	Closed - Successfully	External Lender Name	
Description	LMIR Refi	External Lender	

Chatter

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Production: Application Management

Production Home Chatter Business Development Funding Round Projects Reports Dashboards Appraisal Reviews Project Tasks More

Project **Chris Test - 9.23.19 (2)** New Internal Folder New Customer Folder New Partner Folder

D #	Property	Project #	Secondary Project #	Project Status	Current Phase
D1133	10009 - 36th Place	M18351		In Process	Application

All development team members must have current Qualification forms on file for each funding round they apply for funding. Qualification forms must be submitted 30 days before the funding round. See more information about Qualification forms

Visual Path for Stage

Project Details Timeline Configure Project Checklists **Project Tasks** Project Documents Workbooks Project Team Narratives More

All Tasks My Tasks By Phase/Stage **Workflow Tasks** Calendar

Name	Parent Record	Due Date	Status	Owner
Project Launch Meeting		Nov 29, 2019	Complete	Wilbricht, Karin
Mortgage Credit Committee	Task: Project Launch Meeting	Nov 13, 2019	Complete	Wilbricht, Karin
Review the environmental re...	Task: Mortgage Credit Committee	Oct 24, 2019	Complete	Larson, Christopher
Mortgage Credit Committee			Not Ready	Wilbricht, Karin
Review the environmental review	Task: Mortgage Credit Committee		Not Ready	Larson, Christopher

Asset Management: Properties Management

Asset Management Home Properties Operating Reports Reports Dashboards Project Characteristics

Property 10 - 6th Avenue Se

Property Details **Property Files** Projects Business Development Unacc. Pract. Notes & History

The property files tab is used to manage Property level documentation.

Operating Reports Audits Budgets Special Claims (Private) DocuSign Status

Operating Reports

6 items · Sorted by Operating Reports Name · Updated a few seconds ago

	Operatin...	Mth/Year	Status	Approver	Date Submitted	Submitted by
1	OR-0015	April, 2019	Changes Required	Christopher Larson	4/19/2019 12:0...	Karin ProdDevelo...
2	OR-0014	May, 2019	Approved	Christopher Larson	5/24/2019 12:0...	Christopher Larson
3	OR-0013	June, 2019	Approved	Christopher Larson	6/21/2019 12:0...	Christopher Larson
4	OR-0012	July, 2019	Approved	Christopher Larson	7/26/2019 12:0...	Denise Posey
5	OR-0011	August, 2019	Approved	Christopher Larson	8/16/2019 12:0...	Denise Posey
6	OR-0010	September, 2019	Submitted	Christopher Larson	9/9/2019 12:00 ...	Christopher Larson

[View All](#)

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Chatter Activity

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[Christopher Larson](#) to Minnesota Housing Only
September 16, 2019 at 4:56 PM

Envelope for Property__c "10 - 6th Avenue Se" was signed and completed in DocuSign. Elapsed Time: 5 minutes

[View DocuSign Status](#)
/a1H0r00000dSNOEA2

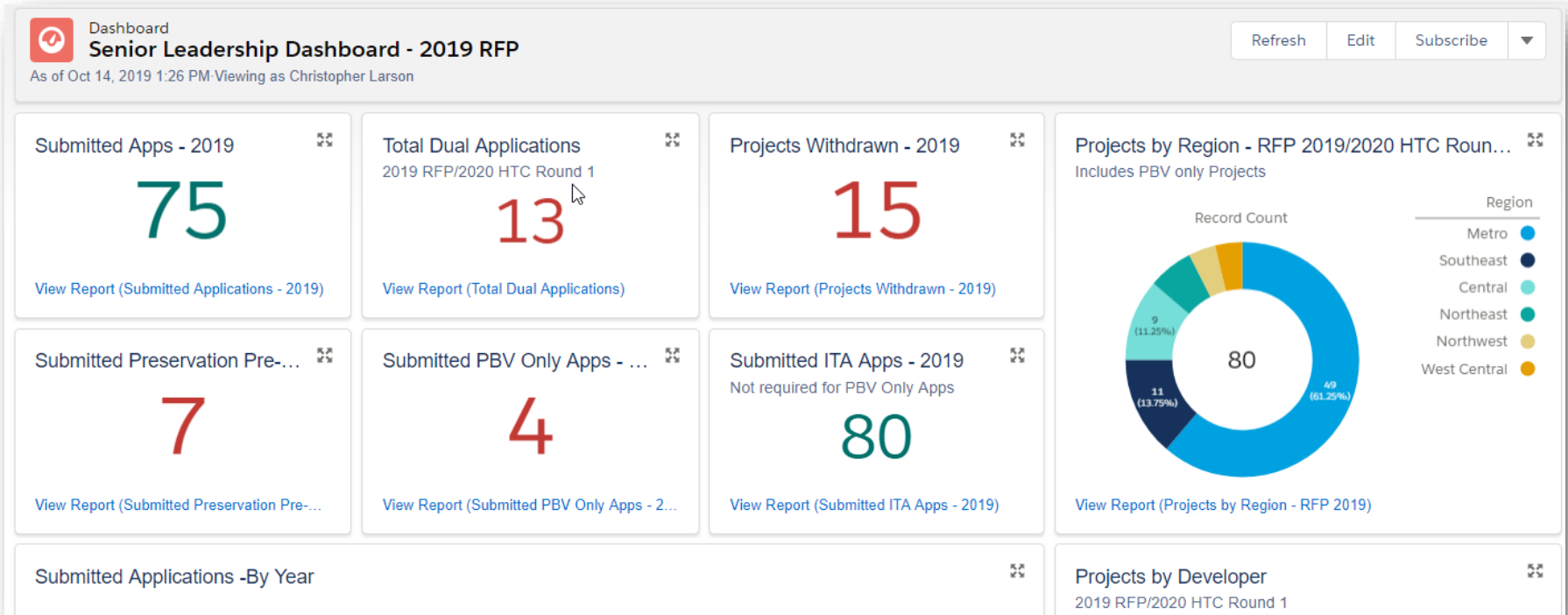
Like Comment

Write a comment...

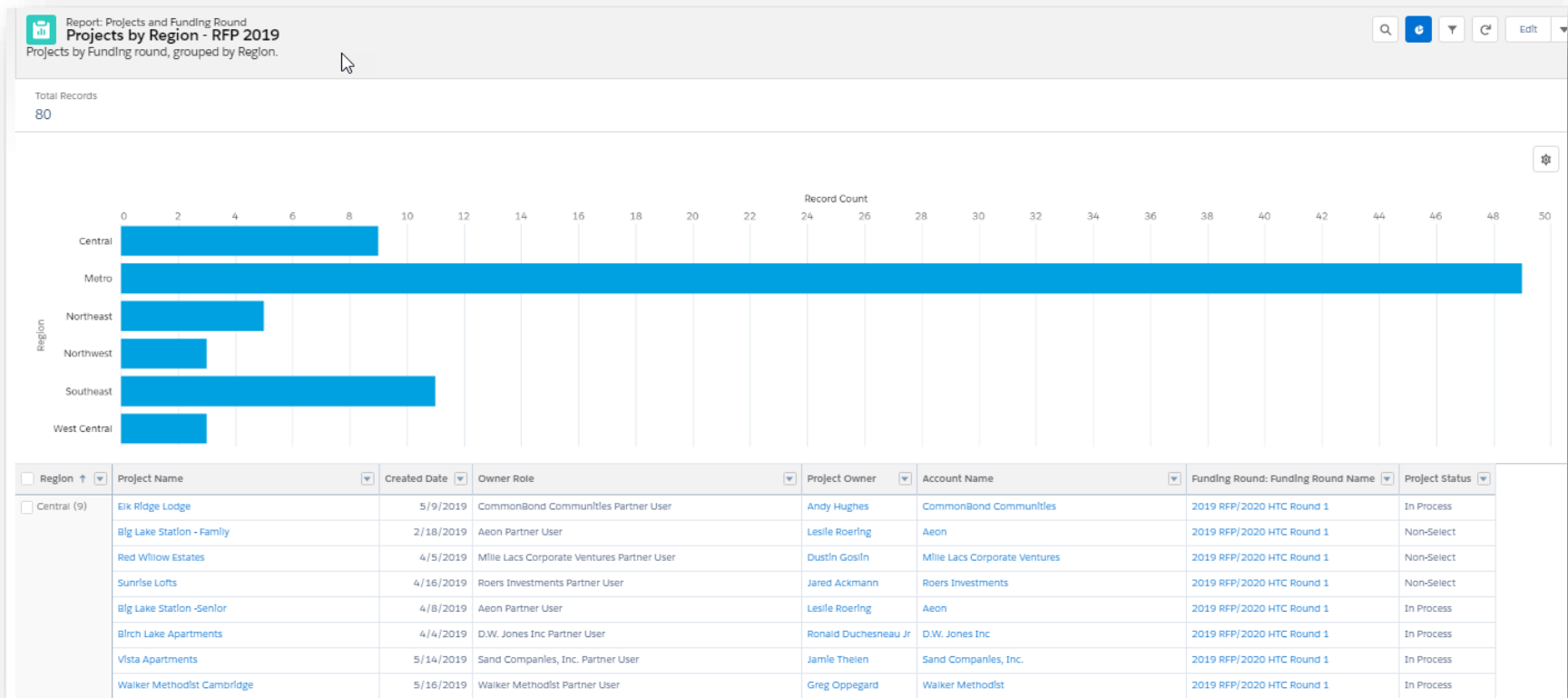
[Christopher Larson](#) to Minnesota Housing Only
September 10, 2019 at 4:53 PM

@Christopher Larson thanks for submitting your forms, but you uploaded your budget instead of your operating report

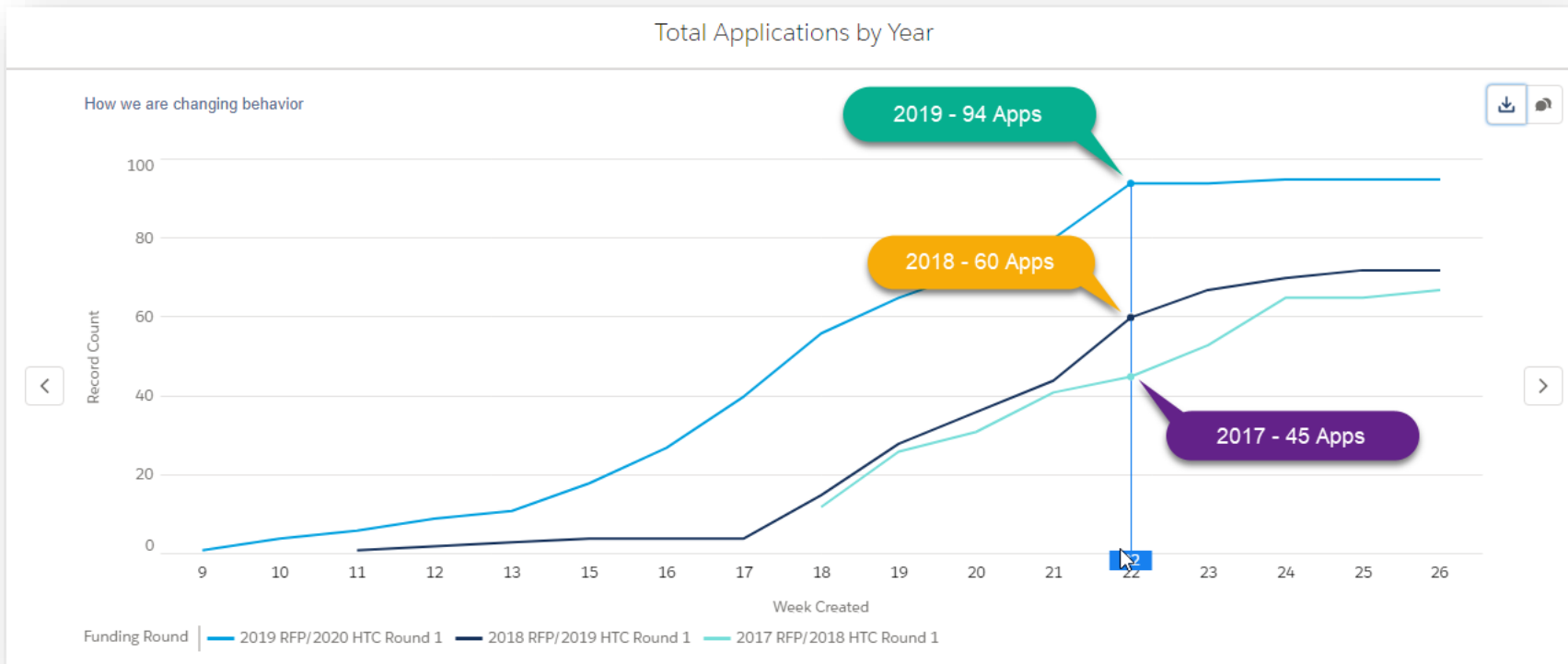
All: Dashboards Views



All: Data Driven Reporting



All: Using the Data





Change Management Strategy

Partnering for Success

- **Build Solutions Together**
 - Empathize, define, design, build, and review/refine
- **Constant Communication**
 - Promote the vision through multiple sources
- **Training and support**
 - Demos, Hands-on Training, Feedback Loop, Open Office Hours, Webinars

Partnering for Success

- Strong senior leadership support
 - Promotes vision and strategy and influences management team and staff
- Support of management team
 - Leads by example and positively influences staff to adopt a culture of learning
- Staff Influencers
 - Champions for change and the “go to” person for their team

Important Take Aways

- Organizational structure matters
 - Key decision making structures
 - Sponsorship
 - Customers
 - Data is critical
- Empowerment matters
- Success breeds additional success

Key Goals – What was Important

- #winning

MFBF - Transition existing framework to new framework

- Logical Design - TBD
- Physical Design - TBD
- ETL Design - TBD
- 1st Test Migration to UAT - TBD
- Internal User Training - TBD
- External User Training- TBD
- Pilot Program - TBD
- Full Data/File Migration - TBD
- Go Live - TBD
- Win NCSHA Award - 10/19/19

Questions?

Tony Peleska, CIO
**Christopher Larson, Application
Development Manager**