

## PROJECT & CHANGE MANAGEMENT

With a proven track record of successful project delivery, we bridge the gap between business and IT, engaging with stakeholders at all levels to clearly define deliverables and ensure that tasks are completed on schedule. We facilitate clear and open communication of project risks, issues and status updates to ensure that expectations are managed appropriately and address the “human side” to ensure change is implemented seamlessly within your business. Some of the projects we have managed include:

- Working with BPAY to enhance its business operations and customer service processes, Phil developed an implementation plan (and a series of supporting business cases) for a major program of business process and capability improvements. Two major components of these works included a new CRM as well as a new client (self-service) on-boarding process.
- Project managed the set-up of a new lending program funded by the Commonwealth Bank and distributed by Aussie Home Loans. This project involved a complex operating model with numerous service providers and delivery of a highly sophisticated loans origination and servicing platform with its core components being:
  - Online application lodgement
  - Broker portal online access
  - Credit workflow processing
  - Documentation and settlement
  - Core servicing

- Arrears management
- Internet banking
- Business intelligence and reporting
- Project managed the start-up of a new loans servicing subsidiary within Bluestone Mortgages involving software selection, procurement, customisation and implementation of core servicing system, telephone and internet banking, data conversion, transition of over 30,000 accounts and staff recruitment.
- Project managed the transition of Westpac transactional banking facilities from one lender to another and the setup of new transactional banking facilities with Commonwealth Bank. Both projects included direct debit, direct credit, payments, off-system BSB, cards and BPAY facilities
- Engaged with third parties to facilitate due diligence processes including:
  - Obtaining accreditations e.g. Rating Agency rankings
  - Portfolio review for loan portfolio purchase/sale
  - Assessing readiness to support external Secured Receivables Funding

## More Information

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