

MTC

Assessment, Scoping and Planning Services

Business organizations seeking to ensure sufficient resources and capability are available when implementing solutions may seek guidance with this up-front, critical program effort. Implementing new solutions, with unfamiliar technology, with multiple dependencies, and unknown project risks can often result in failure when up front expectations aren't in-line with the pending project reality.

An effective planning process which clarifies scope, solution components, implementation approach and risk management methods is essential to achieving success on projects.

Services

With mature project definition and scoping services, Markets Technology & Compliance ("MTC") helps companies plan their programs and related projects to help achieve their expected results. We combine expertise and lessons learned from scoping technical solution projects, defining solution key components, resource capability and availability, budgeting, road-mapping, and risk identification. Our project planning services include:

- Identifying gaps between current vs. future state vision
- Identifying essential business and functional requirements, timing, constraints, targeted benefits and causes limiting prior progress
- Evaluating or determining critical elements of the targeted technical solution (such as features, availability characteristics, volumes) and related implementation risks
- Identifying and evaluating potential options, including vendor provided platforms, outsourced solutions, custom-developed applications, and providers
- Defining solution development, implementation, transition, change management and project management approaches and governance
- Defining overall solution and project scope and gaining buy-in from critical stakeholders
- Assessing the availability, adequacy of resources and overall project cost
- Building a program implementation and dependencies roadmap to implementation

Why MTC

With our experience scoping, defining, and leading hundreds of systems development and integration projects, MTC's consulting team has developed and refined the techniques essential to effective initiative planning. We apply best practices, industry standards and incorporate client needs to enable effectively planned and executed programs. Our approaches can be applied on both new initiatives and existing projects striving to achieve expected benefits.

Through information technology, compliance and advisory services, Markets Technology & Compliance helps organizations achieve greater efficiency and value from project delivery and compliance initiatives.

Client Successes

MTC's consulting team has been engaged in hundreds of project, program, and portfolio planning and execution efforts and has assessed and planned platform projects in multiple settings. Some examples of our work include:

- ✓ Government Securities Auction Platform Selection and Planning
- ✓ Asset-Backed Securities Platform Selection and Planning
- ✓ Foreign Exchange Trading and Back Office Platform Selection
- ✓ Enterprise Case Management Platform Solution Assessment
- ✓ Enterprise Compliance Platforms Comparative Analysis
- ✓ Regulatory Compliance Data Platforms Requirements and Planning
- ✓ Employee Onboarding Background Verification Platform Selection
- ✓ Equities Exchange Performance and Throughput Assessment
- ✓ Enterprise Data Warehouse Program Stand-Up
- ✓ Hedge Fund SDLC Methodology Assessment

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