The two day offsite was not only a socialization event for the two partner teams to have face to face communication and get to know the new employees but more importantly provided cross function training and education to expand everyone’s knowledge base outside individual’s expertise including CCAR, ALLM, Tableau 3.0, cloud data and more. The two teams got the chance to know each other’s responsibility, projects and plans more clearly and it would be greatly helpful for future collaboration.

The offsite also had interactive sessions to collect thoughts from the members and align the expectations between two teams. For example, the extensive BRP discussion set up the guidance for model commentary which would effectively improve the quality and efficiency in the future BRP process. The project Hedwig discussion collected customized function requests and the things that people want to change in the current system to better suit for business need.

Participants also expressed the wish to hear about each team’s achievement, background and impact about the consumer review and model issues for education purpose and feedback about the new Credit Review system in next year’s offsite.