90-day Plan for Digital Banking Lead/Project Coordinator

Putting together the expectations for the Digital Banking Lead or Project Coordinator of Rural Bank of Sagay Inc.

Driver	Graham Jimenez, CEO, HSI Technologies
Recipient	Kent Engbino, Digital Banking Lead/Project Coordinator
Visibility and Approval	Alex Yupangco, President, Rural Bank of Sagay Inc.
	Tony Alvarez, Compliance Officer, Rural Bank of Sagay Inc.
Start Date of 90-Day	January 2, 2024

Expectations

By the end of the this 90-day plan, you are expected to have:

- In-depth understanding of technology and IT-related BSP compliance
- Familiarity with banking functions and operations
- Basic industry knowledge in banking, technology, and fintech
- Project management skills
- Strategic thinking and decision-making skills
- Efffective communication skills
- Contribute in solving problems related to both technical and operations

Guiding Thoughts

The expectations set above are the goals; for you to get there, it will be built over time. Again, there is no shortcut to competence. This 90-day Development Plan, should, at least, give Kent a head start and direction on how to build competence and expertise.

- **Take time to learn.** Don't get sucked into the minutia of decision-making or project involvement too early - there will be plenty of time for that later. In your first 30 days, try to focus on getting comfortable and learning how things work.
- **Invest in relationships.** By day 60, you'll be in execution mode. In your first two months, spend as much time as you can getting to know people and forming relationships.

- **Don't be afraid to ask.** No one expects you to know how things work right away. Take advantage of that and ask for help when you need it.

Key Results Areas and Performance Indicators

Areas	Important Questions	Indicators
Stakeholders	How do I ensure internal/external stakeholder satisfaction?	Establish trust and confidence with various stakeholders.
Financials	How do I contribute to the company's overall profitability?	Generate revenue through product adoption and use.
Processes	How do I contribute to the improvement of internal processes and increase efficiency?	- Demand documentation - Present business cases to define priorities - Product compliance aligned with regulations and ensuring no findings. - Identify risk controls
People	How do I contribute to the organizations culture, self-learning, and growth?	- Secure organizational support of the product in place from different units such as finance, tech, commercials, risk/compliance. - Ensure product designs are adherent to stakeholders' requirements

Key Results Areas and Performance Indicators

Timeline	Action Items

30-day
 	
Checkpoint: Feb 2, 2024
	☐ Documentation: map out the entire technology infrastructure of the bank.
	    ☐ On-premise Network
	    ☐ Core Banking System
	    ☐ Digital Infrastructure

	☐ Familiarity with software project management concepts such as Agile/Scrum and Waterfall
	☐ IT-Related Compliances:
	    ☐ Data Privacy Act of 2012
	    ☐ BSP MORB 112
	    ☐ BSP MORB 148
	    ☐ BSP Circular 1137 s.2022
	    ☐ BSP Circular 1140 s.2022
	    ☐ Banking Laws

60-day
 	
Checkpoint: March 4, 2024
	☐ Documentation of implemented systems in RBSI Digital:
	    ☐ Business Policies
	    ☐ Security Policies
	    ☐ Access Rights of Tools and 3rd Party Softwares
	    ☐ APIs from MBWin
	    ☐ Flowcharts and dataflow diagrams
	☐ Documentation of operatings costs for RBSI Digital
	☐ IT-related Compliances:
	    ☐ BSP MORB 803
	    ☐ BSP Circular 1033 s.2019
	    ☐ BSP Circular 1160 s.2022
	    ☐ BSP Memo M-2022-015
	    ☐ BSP Memo M-2022-045
	    ☐ BSP Circular 1019 s.2018

90-day	☐ *To be followed*
	☐ IT-related Compliances:
	    ☐ BSP Memo M-2022-015
	    ☐ BSP Memo M-2022-045
	    ☐ BSP Circular 1019 s.2018

By the end of the 30-day, 60-day, and 90-day, Kent must provide a visual and oral presentation of his progress. Emphasize the wins, challenges, and the show stoppers.