



Product Development

2014 DDI User Group Meeting
April 22-23, 2014



Serving those who serve others





Session Topics

- ❑ Product Development Team
- ❑ Product Development Approach
- ❑ The Power of Collaboration
- ❑ System Development Life Cycle (SDLC)
- ❑ Product Development & Enhancement Process
- ❑ 2013 Metrics & Highlights
- ❑ 2014 Major Projects / Initiatives
- ❑ Open Discussion & Questions





Product Development Team

☐ John Allen (Sr. Architect)

- With DDI since 1990
- Developing systems for over 26 years.

☐ Bob Carlisle (Project Owner)

- With DDI since 2004
- Developing systems for over 22 years.
- CPA in a prior career

☐ Paul Evans (Web & .NET Programmer/Architect)

- With DDI since 2013
- Developing systems for over 6 years.

☐ Areca Everage (Project Manager, Programmer/Analyst)

- With DDI since 2012
- Developing systems for over 10 years.

☐ Al Gomez (DBA / Sr. Programmer Analyst)

- With DDI since 1996
- Developing systems for over 21 years.



Product Development Approach

❑ Pull vs. Push Delivery

- Deliver what works best for our clients vs. what sells new business

❑ Software as a Service (SaaS)

- Pure Cloud Hosting & Deployment
- Changes are deployed to all when complete
- One code base for all clients
- No upgrade hassles



The Power of Community and Collaboration

- Employed during all phases of the System Development Life Cycle both internal and external.
- Always seeking more client participation!

“Under the right circumstances, groups are remarkably intelligent, and are often smarter than the smartest people in them.”

James Surowiecki
Economist





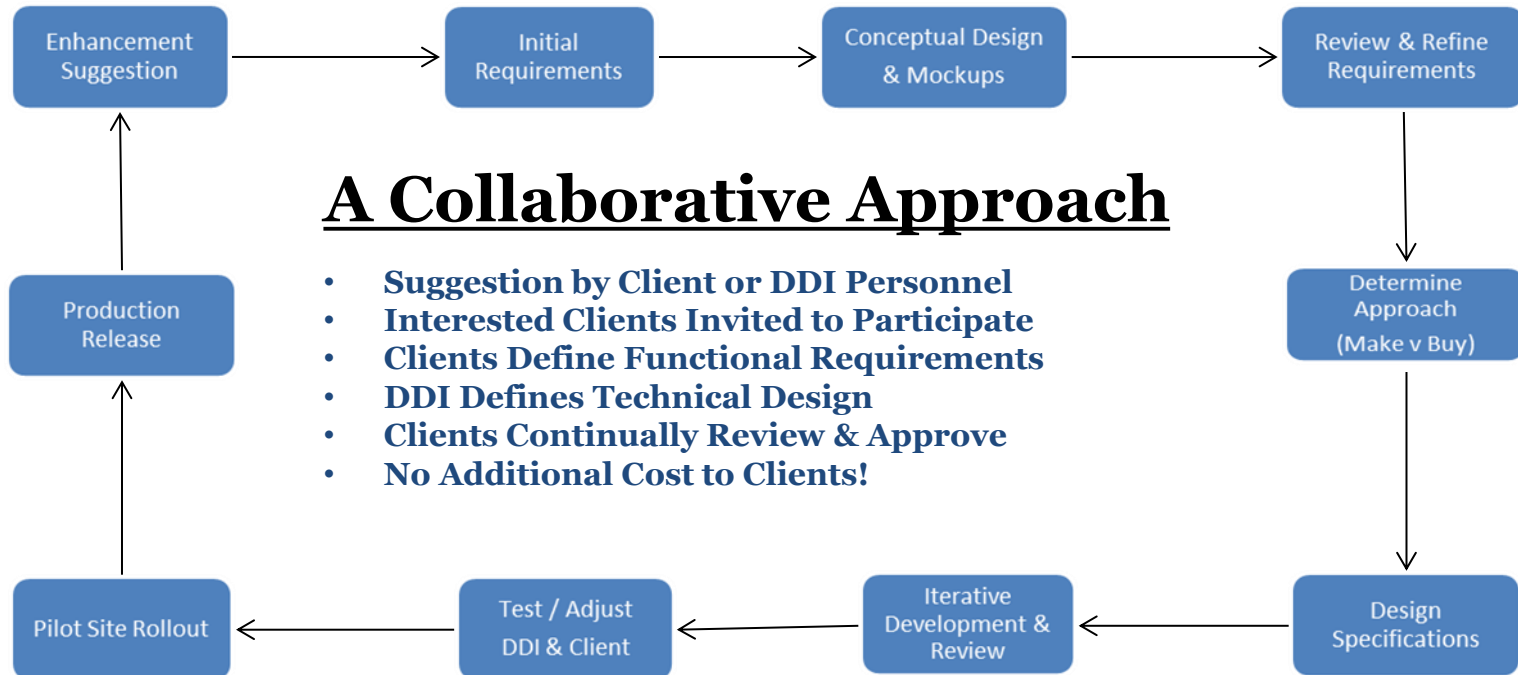
System Development Lifecycle (SDLC)

- ❑ Standard process for client Requests for Change (RFC's)
 - Requirements Elicitation / Definition
 - Design & Development
 - Testing – Internal & Client
 - Client Approval
 - Implementation

- ❑ Development methodology document and process flow
 - DDI Development Methodology.doc
 - Describes each phase in detail
 - DDI Development Process Flow.pdf
 - Diagrams the process and roles



Product Enhancement Process





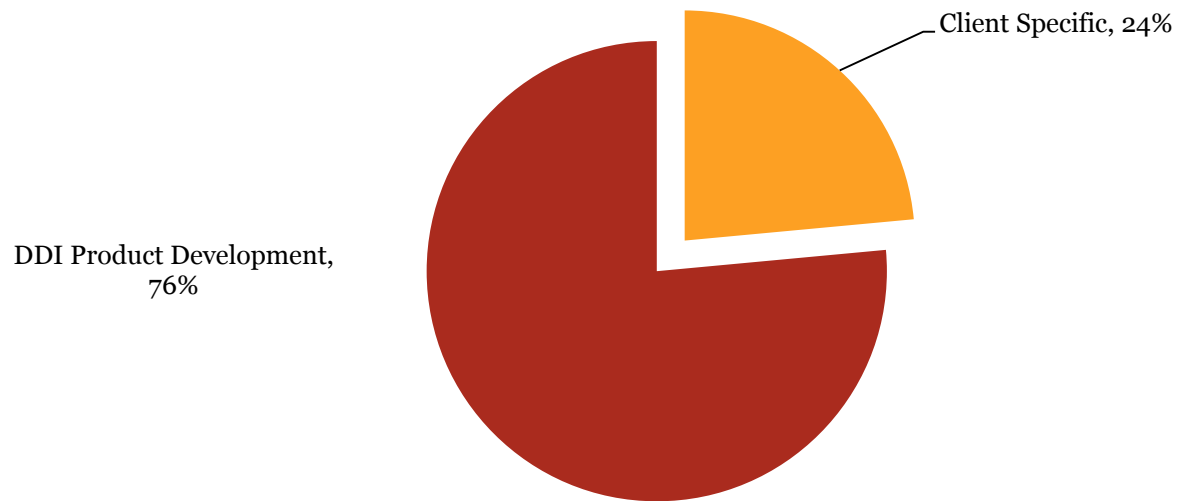
“Agile” Methodology for Product Development

- ❑ Initial Requirements Determination
 - UG Meetings
 - Client support feedback
 - Separate meetings for interested clients
 - Product research
- ❑ Build vs. Buy Analysis
 - Research of existing products & functionality
- ❑ Collaboration & Prototyping
 - Iterative development & demos with clients
- ❑ Testing
 - Internal & Client
- ❑ Implementation



2013 Team Metrics

Product Development Team Only Overall Time Allocation





2013 Product Development Highlights

Next Generation of DDI Connect

- ❑ Researched & Analyzed UI and database technology options
 - Pros, cons, costs, life expectancy
 - Desktop GUI vs. Web UI
 - Feasibility for DDI including time, costs & resources
 - Gartner & Forester Research
- ❑ Engaged outside consultants
 - Advised on strategy & architecture options
 - Prototype framework for possible Web platform
- ❑ Researched 3rd party tool sets and possible module replacements
 - Progress & .NET Development tool sets
 - Other possibilities include: job scheduling & centralized email alerting
- ❑ Developed DDI Connect Application Prototype
 - WEB UI (MVC)
 - New Desktop UI in .NET
 - Explored using SQL Server database
- ❑ **Client Support team business requirements & mockups**





2013 Product Development Highlights Other Enhancements

□ Online Web Services

- Online Loan Payments (Feb)
- Investment deposit (Aug)
- Loan Payment History (Aug)
- Many more minor enhancements and improvements

□ Business Intelligence – Digital Dashboard (D3)

- Added many more clients and data subjects
- Upgraded 3rd party tool set DataPA



2014 Major Projects & Initiatives

□ Next Generation of DDI Connect

- New more intuitive User Interface (UI) based on .NET technologies
 - More consistent look & feel including icons, theming, etc.
 - More robust grid views with column chooser and pivot functionality
- New Simplified Security Architecture
- New Process Management goes live!
- New General Ledger and other Accounting modules

□ What's Next for Next Generation?

- Investment & Loan prototype?
- Name & Address prototype?
- Outlook integration?
- User controlled robust job scheduling?



2014 Major Projects & Initiatives

(continued)

□ New Online Web Services Functionality

- Credit Cards for loan payments and investments
- Account access and role management
- DocuSign for automated electronic signatures
- Online giving using Qgiv or Hobnob
- Alerts for balances, amounts due, big transactions, etc.
- Any interest in a mobile version?

□ Business Intelligence — Digital Dashboard (D3)

- More client implementations and subjects
- Ad-hoc query reporting
- Pivot table & chart functionality
- Financial reporting (GL) subjects
- Any interest in web or mobile access?



OPEN DISCUSSION

- ❑ Ideas on how we can solicit client participation and feedback on the Next Generation of DDI Connect project?
 - Client feedback group?
 - Group emails & demos?
 - Periodic conference call?
 - Discussion group in LinkedIn?

- ❑ How should we solicit feedback on other product enhancements such as Online-CEF and Digital Dashboard (D3)?

- ❑ Other ideas, suggestions or questions?





Contact Info



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