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Deal Factory (Loan Analysis and Pricing System)



The Need

In 2001 our client initiated a project called Deal Factory to streamline business processes within the Investor Channel group and work on the development and implementation of process improvements built into the Deal Factory system to eliminate redundancies.



The Solution

Deal Factory was built to be an integrated set of systems used to help the Investor Channel analyse seasoned or non-standard deals for potential purchase by the client. The system managed the workflow of loan packages, received loans, scrubbed the loan data, determined risk, set prices, tracked deal progress, recorded decisions and verified delivery of loans. A reporting system was built on top of the relational database to report on the deal activity as well as the performance of the loans in the deal packages.

The Purpose

The Purpose of Deal Factory was to efficiently evaluate shelf and non-standard closed loan deals to provide maximum value for the corporation. Using the system, lenders could submit loan files for rapid loan level risk analysis, credit evaluation, pricing, and then receive a timely, competitive bid for their product. It streamlined the business process and enforced standard data checks and process flows, allowing verification of priced loans to delivered loans.



The Deliverables

Cyquent provided consultants that worked with the Client team to provide the following services:

- Analysed existing work flows and defined new and improved processes to meet the identified business requirements
- Documented the functional requirements of the system, and the design of the proposed solution
- Assisted in the development of the Deal Factory system on a J2EE platform.
- Managed the life cycle of the project from requirements to delivery
- Created test plan, test procedures, test cases and executed the test plan to ensure that the system met the requirements in terms of functionality and performance
- The new system went into production in less than a year from project initiation
- After the new system was live, Cyquent's team worked with the Client's team for several years to maintain the system, and build enhancements and new systems that were integrated into the original system

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