

DFS Toolkit for Financial Institutions: Making the Go/No Go Decision

Use this template to summarize high level results of the feasibility study and evaluate recommendations to make “go/no go” and “how to go” decisions regarding a potential new DFS channel deployment

Investing in individuals.
Improving our world.

Vision for DFS Strategy at [FI]

[“vision statement”]

E.g. *“Use technology enabled channels to support bank expansion (geographic and customer numbers) in a manner that is both cost efficient for the bank and convenient for the customer.”*

Go/No Go: Does Proposed Project Meet Strategic and Business Objectives?

- Does the proposed project make sense strategically? *[List strategic objectives and describe how project will meet them].*
- Does the proposed project make sense from a business perspective? Do the business objectives align with the strategic objectives? *[List business objectives and describe how project will meet them].*
- Reality check: are strategic and business objectives aligned?

Go/No Go: Do Strengths and Opportunities Outweigh Weaknesses and Threats? Is There a Plan to Mitigate?

- [Combine and summarize SWOT findings from Internal and External Analyses.]*

Strengths	Weaknesses
Opportunities	Threats

Go/No Go: Is There a Compelling Business Case?

- Do the numbers make sense? [*Summarize main assumptions and findings of High-Level Business Case.*]

Go/No Go: Have You Considered Relevant Risk Categories and Begun to Develop Mitigation Strategies?

- DFS Toolkit for Financial Institutions Risk Review: have you identified all potential risks? *[List risks and potential mitigation strategies.]*
 - Operational risks
 - Financial risks
 - Reputational risks
 - Technology risks
 - Regulatory risks
 - Human Resources/Capacity risks
 - Other risks?

Assemble Findings to Make Go-No Go and When-to-Go Decisions



“How-to-Go” Decision Informs Implementation Plan

- Once a “Go” decision has been reached, continue to build on the tools you have used for the Feasibility Study phase to start planning “How to Go,” based on recommendations from *Overview Feasibility Study Findings*, and moving to next phases of the DFS Toolkit for Financial Institutions.

