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.
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.]

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<th>Strengths</th>
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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

1. Strategic Role Definition
2. Business Objectives Identification
3. Internal & External Analysis
4. High-Level Business Case

Go/When-to-Go
“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.