

2025 Financial Management Conference

Implementation 2.0

Brent Bozman, Controller, Neighborworks Capital

Christine Wendell, Co-Founder & CEO, Pronto Housing

Michael Fairley, Investment Account Manager, MRI

Sarah Dunn (Moderator), Managing Director, ZRG Partners

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STRENGTHMATTERS[®]



Continuing Professional Education (CPEs) Requirements for CPAs

- Please find the **SESSION HOST** to **SIGN IN** at the beginning and **SIGN OUT** at the end of every session. We use that attendance log to verify your participation for CPE credits.
- Please **submit all conference evaluations**. Evaluation links are emailed to registrants daily. The session host monitoring the sign-in process has paper evaluations if you prefer.
- For more information on CPE credits, contact Lindsay Wells at consult.lwells@gmail.com.

Agenda

- Introductions
- Review Learning Objectives
- Interactive Panel
- Pillars
- Who's in the Room?
- Trade-offs
- Business Transformation
- Adoption
- Wrap up

Introductions



Brent Bozman
Controller
Neighborworks
Capital



Christine
Wendell
Co-Founder &
CEO
Pronto Housing



Michael Fairley
Investment
Account
Manager
MRI



Sarah Dunn
(mod)
MD
ZRG Partners

Learning Objectives

Attendees will come away with the best practices and tools to get the most from your implementation. We will cover business transformation, org. chart impacts, training, adoption, and the use of consultants.

Poll

By a show of hands, what best describes your company?

- Owner/Operators
- Investors/Lenders/CDFIs
- Service Providers
- Other?

Poll

Who has been the PM for an implementation in the last year?

Where are you currently in the implementation process?

- Near-launch
- Post-launch adoption period

Questions

- This will be a highly interactive session.
- As a professional courtesy, please extend confidentiality within the room.
- Be candid and specific so we can all learn from each other.
- We will be troubleshooting real issues in real time during each segment.

Small Group/Table Sessions

What are the key issues/challenges you're having with your implementations?

Report-out

Pillars

- What does a successful implementation look like?
- What is the cost of this implementation failing?
- Three Stages – Planning/Implementation, Adoption, Continuous Improvement
- Issuing an RFP
- Business Transformation

Who's in the Room?

- Champion
- Project Manager
- Senior Leader/Decision-Maker
- End Users
- Hold-Outs

Trade-offs

- Cost vs. Schedule
- Consultant use
- Customization
- Project management capacity
- Bring in expertise in implementation
- Cultivating internal experts
- Consensus/collaboration in process

Business Transformation

- Mapping process / task change
- How does the organizational chart need to change?
- Identifying weak performers
- Shifting team responsibilities

Adoption

- Including Senior Leaders
- Establishing priorities
- Train the trainers
- Content
- Documentation of tasks/workflows
- Using incentives
- Quick wins/solve a persistent/annoying issue

Centralization

- Leasing
- Facilities/Maintenance Teams
- Floating teams/vacation relief
- Balancing compliance

Evaluation Reminder

- Please submit all conference evaluations.
- Look for the electronic evaluation link in your email.
- Contact consult.lwells@gmail.com if you do not receive the link.

CONTACT INFORMATION

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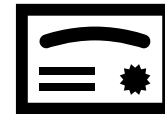
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