

“A good plan executed today is better than a perfect plan executed at some indefinite point in the future.”

–General George S. Patton, Jr.



US Small Business Administration IT Success Story

CIO Council Agenda

January 20, 2010

- ▶ What are the initiatives?
 - ▶ Why are they considered successes?
 - ▶ Why does it matter to you?
 - ▶ Q&A
- 

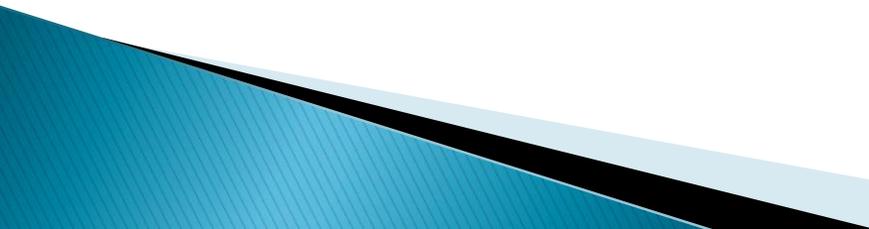
What are they?

- ▶ Customer Relationship Manager (CRM) – “The Window”
 - ▶ Executive Secretariat Correspondence Management
 - ▶ Audit Tracking, Visibility and Accountability
- 

Why are they successes?

- ▶ CRM – “*Customer Service*” Relationship Management Focused
 - Game changing technology that aligns with the Administration’s and SBA’s mission to support small businesses, foster collaboration and increase transparency
 - Rapid Delivery using Recovery Stimulus Funding (ARRA)
 - 5 Months from market research to deployment within PMO governance requirements
 - Initial Field Operations Deployment
 - 1,100 Users to 66 Field Offices – Including Puerto Rico, Alaska, Hawaii, Guam, and American Samoa
 - Private Cloud Implementation
 - True Commercial Off The Shelf (COTS) Approach
 - Clearly defined Proof of Concept/Vision
 - “The good should not be the enemy of the perfect” – Deployed basic functionality with key value added enhancements
 - Using Social Media Tools to Collaborate
 - Enhancement Requests
 - User Best Practices and Content Wikis
 - Feedback / Dialogue with User Community and Management

▶ CRM (continued)

- Elimination/reduction of data and functional silos/stove pipes
 - SBA Navigation Structure Based on Agency Function
 - Transparency
 - Statistics/Analytics drill down to the Congressional District Level for Congressional Inquiries and future “public self-serve” for lender and business activities
 - Over 150 Operational Goal Metrics “out of the box”
 - Inter-Agency Communications and Document Management (Agencies, Councils, and Committees)
 - Ease of Use/Training – Outlook Tree Structure Based Configuration
 - ROI = Reuse of Investment; Do more with less – Buy once, use multiple times
 - Using technology change to help drive OCIO culture change
 - “Be a part of the success” and get to the “Yes we can attitude”
 - New Technology = New Skills Required = New Staff Excitement = New Contractors = New Culture Opportunity
 - Leveraged Experience from 2 Small Certified Businesses
 - 8a Asian Woman Owned
 - SBA Guarantee Loan Recipient & HUBZone
 - Created 20 New Jobs in Small Businesses using Recovery Funding (ARRA)
- 

Mail

Favorite Folders

Mail Folders

All Mail Items

- Mailbox - Naylor, Robert B.
- Microsoft Dynamics CRM
 - Agencies
 - Agency Committees
 - Agency Councils
 - ACE - Acquisition Council for E-Gov
 - CAAC - Civilian Agency Acquisition Council
 - CAO Council
 - CFO Council
 - CHCO Council
 - CIO Council
 - Council for Women & Girls
 - Council of General Inspectors on Integrity and Efficiency
 - Council on Urban Policy
 - Executive Secretariat Council
 - Small Agency CIO Council
 - Small Business Procurement Advisory Council
 - Small Business Procurement Advisory Council's Goals
 - Workforce/Culture for the CIO Council Strategic Plan
 - Businesses
 - Contacts
 - Deleted Items
 - Internal Contracts
 - Lenders
 - Certified Development Companies (CDC)
 - Certified Lenders Program (CLP)
 - Community Banks
 - Credit Unions
 - Microlenders
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 - Reports and Dashboards
 - Congressional Map
 - HUBZones
 - Lender Funnel
 - Routing Map
 - Standard Reports
 - Resource Partners
 - Settings
 - Workplace

Agencies - Microsoft Dynamics CRM

Search for records View: Agencies

New Create Quick Campaign Run Workflow Mapping More Actions

Name	Address 1: Stre...	Address 1: City	Address 1: Stat...	Address 1: ZIP/...	Address Phone
Agency for International Development	Ronald Reagan ...	Washington	DC	20523-1000	
Department of Agriculture	1400 Independe...	Washington	DC	20250	
Department of Commerce	1401 Constitutio...	Washington	DC	20230	
Department of Defense	The Pentagon	Washington	DC	20301-1400	
Department of Education	400 Maryland A...	Washington	DC	20202	
Department of Energy	1000 Independe...	Washington	DC	20585	
Department of Health and Human Services	200 Independe...	Washington	DC	20201	
Department of Homeland Security	245 Murray Lan...	Washington	DC	20528	
Department of Housing and Urban Development (HUD)	451 7th Street S...	Washington	DC	20410	
Department of Justice	950 Pennsylvani...	Washington	DC	20530-0001	
Department of Labor (DOL)	200 Constitution...	Washington	DC	20210	
Department of Navy					
Department of State	2201 C Street NW	Washington	DC	20520	
Department of the Interior	1849 C Street, ...	Washington	DC	20240	
Department of the Treasury	1500 Pennsylv...	Washington	DC	20220	
Department of Transportation	1200 New Jerse...	Washington	DC	20590	
Department of Transportation					
Department of Veterans Affairs	1722 I Street N...	Washington	DC	20421	
DNI					
Environmental Protection Agency	Ariel Rios Buildin...	Washington	DC	20460	
Farm Credit Administration	1501 Farm Credi...	McLean	VA	22102-5090	
Federal Trade Commission (FTC)	600 Pennsylvani...	Washington	DC	20580	
General Service Administration					
General Services Administration	1800 F Street, NW	Washington	DC	20405	
National Aeronautics & Space Administration	NASA Headquar...	Washington	DC	20546-0001	
National Archives and Records Administration (NARA)	8601 Adelphi Road	College Park	MD	20740-6001	
National Science Foundation	4201 Wilson Bou...	Arlington	VA	22230	
Nuclear Regulatory Commission	U.S. Nuclear Re...	Washington	DC	20555-001	
Office of Management & Budget	725 17th Street...	Washington	DC	20503	
Office of Personnel and Management					
Office of Personnel Management	1900 E Street NW	Washington	DC	20415	
Office of the Director of National Intelligence	Office of the Dir...	Washington	DC	20511	
Small Business Administration	409 3rd Street, ...	Washington	DC	20416	
Social Security Administration	Wieder Park Bu...	Baltimore	MD	21225	

1 of 36 selected.

All # A B C D E F G H I J K L M N O P Q R S T U

Mail

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 - Routing Map
 - Standard Reports
 - Resource Partners
 - Settings
 - Workplace

type address here... Search

Trip: 2.281 mi, 0 hr 6 min

A 445 12th Street SW, Washington DC + -

[Edit](#) ↓

445 12th St SW, Washington, DC 20554-0004

A-B: 0.671 mi, 0 hr 1 min

2 Depart 12th St SW	0.0 mi
3 Turn right onto D St SW	0.5 mi
4 Turn right onto 7th St SW	0.1 mi
5 Arrive at 451 7th St SW, Washington, DC 20024	0.0 mi

B 451 7th Street S.W., Washington DC + -

[Edit](#) ↑ ↓

451 7th St SW, Washington, DC 20024

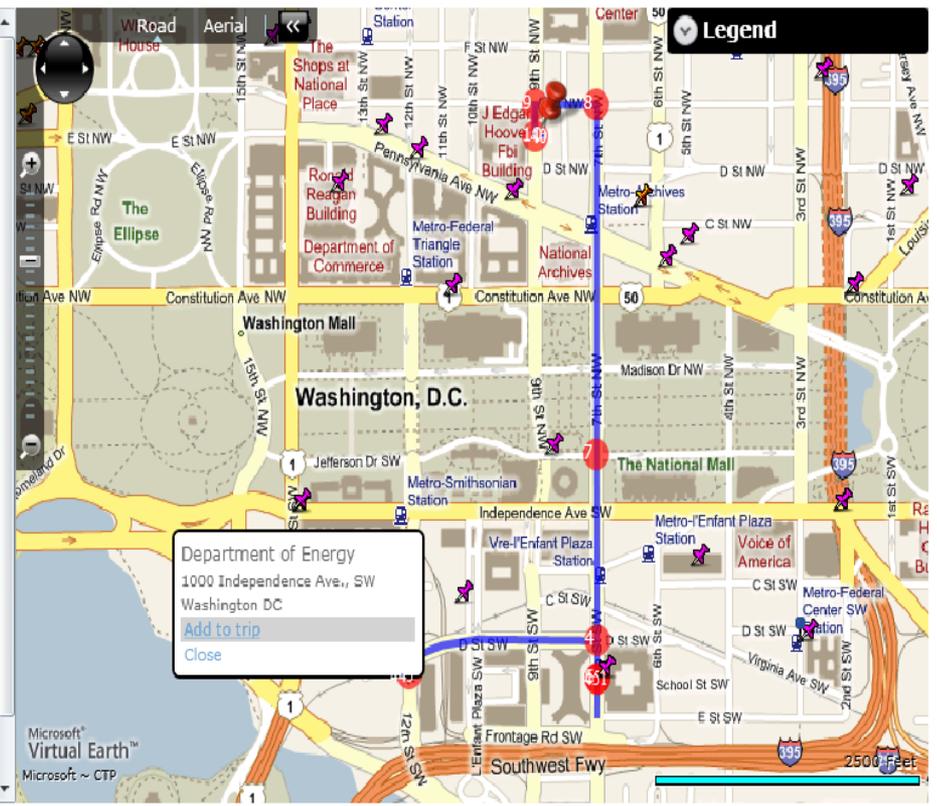
B-C: 1.61 mi, 0 hr 4 min

6 Return on 7th St SW	0.5 mi
7 Road name changes to 7th St NW	0.8 mi
8 Turn left onto E St NW	0.2 mi
9 Turn left onto 9th St NW	0.1 mi
10 Arrive at 401 9th St NW, Washington, DC 20004-2128 on the left	0.0 mi

C 401 9th St NW, Washington, DC 20004-2128 + -

[Edit](#) ↑

401 9th St NW, Washington, DC 20004-2128



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Search

type address here...

Search

Select Date Range

Start Date End Date

Update

Select District

- Georgia Fifth District
- Georgia Sixth District
- Georgia Seventh District
- Georgia Eighth District
- Georgia Ninth District
- Georgia Tenth District

Select State

- All
- Alabama
- Alaska
- American Samoa
- Arizona
- Arkansas

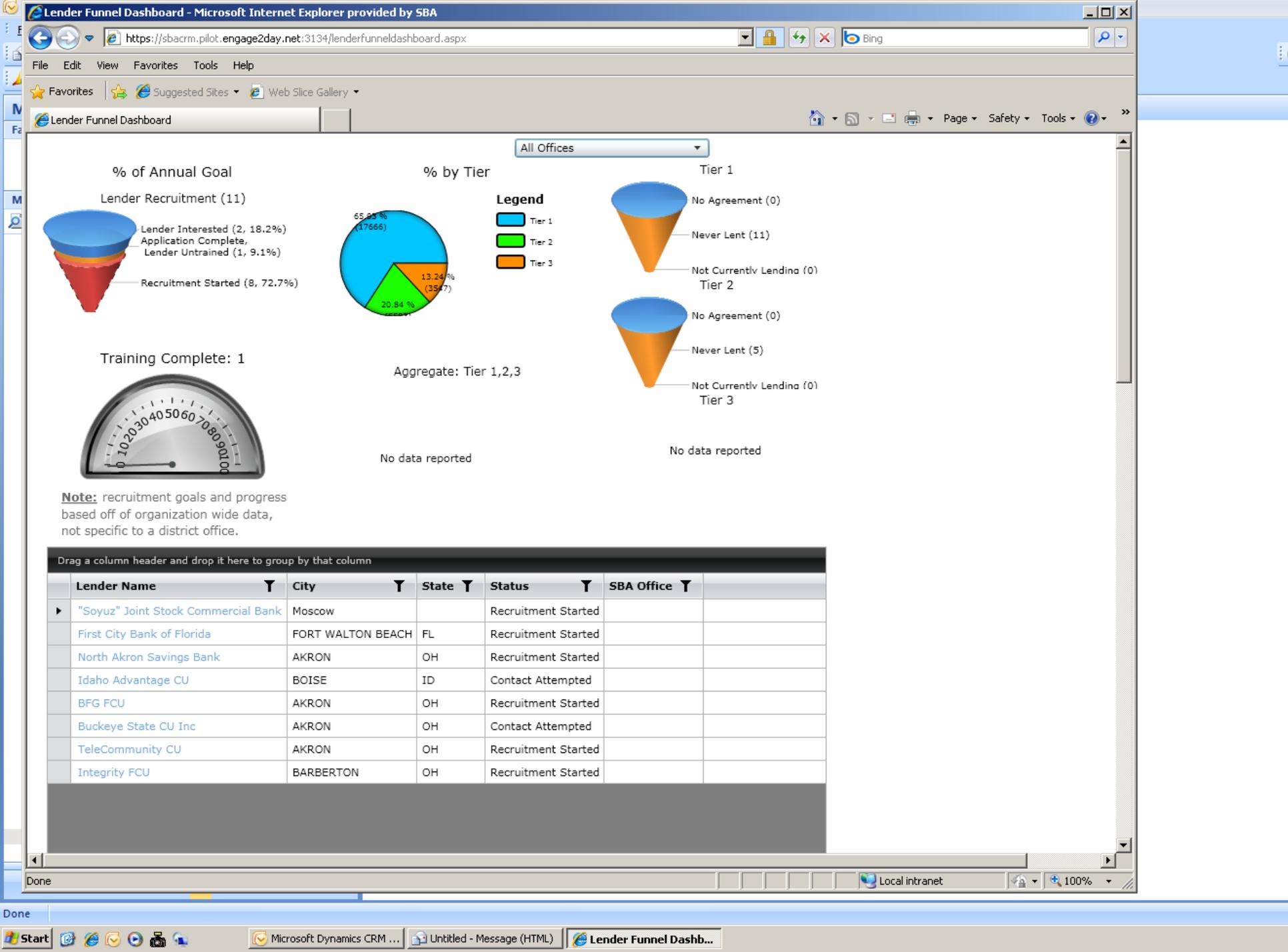
Georgia Fifth District, Rep: John Lewis (Democrat), Population: 629,728

Legend

BEST OFFICE SUPPLY
553 ASHBY STREET SW
ATLANTA GA 30310
[Close](#)

Activities

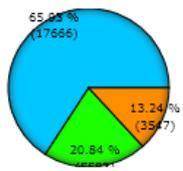
Activity	Businesses	Lenders	Hot Topics
Loans	488 (\$70,313,554.66)	0 (\$0.00)	<ol style="list-style-type: none"> Healthcare ARC Loans Disaster Planning Start a Small Business FOIA Requests
Phone Calls	0	0	
Emails	0	0	
Training	0	0	
Counseling	0	0	



% of Annual Goal



% by Tier



Legend

- Tier 1
- Tier 2
- Tier 3

Training Complete: 1

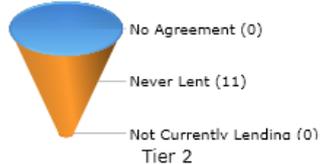


Aggregate: Tier 1,2,3

No data reported

All Offices

Tier 1



Tier 2



Tier 3

No data reported

Note: recruitment goals and progress based off of organization wide data, not specific to a district office.

Drag a column header and drop it here to group by that column

Lender Name	City	State	Status	SBA Office
"Soyuz" Joint Stock Commercial Bank	Moscow		Recruitment Started	
First City Bank of Florida	FORT WALTON BEACH	FL	Recruitment Started	
North Akron Savings Bank	AKRON	OH	Recruitment Started	
Idaho Advantage CU	BOISE	ID	Contact Attempted	
BFG FCU	AKRON	OH	Recruitment Started	
Buckeye State CU Inc	AKRON	OH	Contact Attempted	
TeleCommunity CU	AKRON	OH	Recruitment Started	
Integrity FCU	BARBERTON	OH	Recruitment Started	

U.S. Small Business Administration



Your Small Business Resource

Community Server Enterprise Pilot



My Page

People

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Forum

Files

Wiki

GENERIC CONTENT

The Community serves as a "workplace" for SBA employees who use The Window CRM system. The Community provides a professional and fun environment for you to collaborate, share, archive and reference best practices and help your fellow colleagues optimize the value delivered by SBA's CRM application. Plus, you can showcase your own expertise and willingness to help others!

Collaborate and Participate

- Ask technical and user-related questions and get answers from your peers—fast!
- Answer questions, help others and showcase your expertise.
- Post best practices for using The Window.
- Find frequently asked questions (FAQs) regarding The Window.
- Use The Community as your first destination for getting technical and user help.
- Join forum discussions on the topics that interest you.
- Create sub-groups to work with others.

Contact Engage today to learn more.



SITE ACTIVITY

Post

People & Groups

Messages

My Activity

12-15-2009



RBNaylor joined SBA Community.

12-15-2009 4:45 PM [Delete](#)

NEWS

SBA - Blog

About the CRM Community

The CRM Community portal is managed by the SBA Office of Communication and Public Liaison in partnership with the Office of Chief Information Officer and Office of Field Operations. The purpose of this site is to facilitate discussion about the CRM tool...

01-14-2010 2:54 PM
by [Steve Morris](#)
0 Comments



CRM Mobile Express allows real-time access to your Microsoft CRM data from any Internet-capable device.¹

Create rich mobile 'mash-ups' with full access to the CRM Mobile Express source code.²



- ▶ Correspondence Management – Knocking Down the First Application Silo
 - Native to CRM (***BUILT-IN***)
 - Correspondence Management Core Functionality
 - Help Desk/Answer Desk/Knowledge Base/Case Management
 - Leveraging Investment in SharePoint and CRM foundation
 - ROI – ***Reuse*** of Investment – Real Cost Savings!
 - No Additional Licenses
 - No Additional Hardware/Infrastructure
 - No Additional Vendors
 - No Additional Software Maintenance
 - No Additional Technical Support Staff
 - No Additional Integration
 - No Additional Contract/Procurement Process (Task Order)
 - No Additional Project Management/Government Investment Management Governance
 - Available Enterprise-wide, leveraging metrics, reporting, dashboards, etc.



Batch

- Document 1
 - Page 1
- Document 2
- Document 3
- Document 4

July 7, 2009

Ms. Molly Dempsey
 2354 Frayne Ln
 Seattle, WA 98162
 Box 555-0154
Molly.dempsey@example.com

Dear President Obama,

I want to personally congratulate you for the progress you and your administration have made with our economy.

Here in Seattle, housing costs are a major concern with families such as The Dempsey's. In King County, the median price for a home, currently at \$305,000, is down 13% year over year but I strongly believe that the American Recovery and Reinvestment Act will turn things around.

I'm also a small business owner. I'm looking forward to learning more about your plan to boost lending to the thousands of small business owners in the United States. I feel we represent the heart and soul of America and can be instrumental in carrying out your plan.

On behalf of my husband, Rozzie, my daughter Katie, and my 26-employees, thank you for your dedication.

Sincerely yours,

Molly

Molly Dempsey

Indexing Document 1

Document Class: Policy Comment

First Name: Molly

Middle Name:

Last Name: Dempsey

e-Mail: Molly.dempsey@example.com

Phone: 555-0154

Address 1: 2354 Frayne Ln

Address 2:

City: Seattle

State: WA

Accept

Clear

Cancel

Workplace

Presidential Review

- Today
- Tomorrow
- Upcoming
- Proposed

Management Dashboard

- Summary
- Activity Summary
- Correspondence Report
- Department Summary

My Work

- White House Homepage
- Document Search
- Activities
- Calendar
- Queues
- Cases
- Reports
- Announcements

Constituents

- Orgs
- Contacts

Personalize Workplace ...

Workplace

Settings

Queues

Accept...

- My Work
 - Assigned
 - In Progress
 - Queues
 - General Comment
 - General Support
 - Gift
 - Inbound Review
 - Invitation
 - Policy Comment
 - Presidential Review
 - Print Management
 - Request for Action

<input type="checkbox"/>	Title	Entered Queue	Type
	From WhiteHouse.gov:Test 7/19/2009	7/17/2009	E-mail
	From WhiteHouse.gov:Situmus package	7/10/2009	E-mail
	From WhiteHouse.gov:Merry Christmas	7/9/2009	E-mail
	From WhiteHouse.gov:z	7/9/2009	E-mail
	From WhiteHouse.gov:z	7/9/2009	E-mail
	From WhiteHouse.gov:Merry Christmas	7/9/2009	E-mail
	From WhiteHouse.gov:Merry Christmas	7/9/2009	E-mail
	General Comment from Molly Dempsey	7/9/2009	Letter
	General Comment from Molly Dempsey	7/9/2009	Letter
	General Comment from Joseph Biden	7/8/2009	Letter

Workplace

Presidential Review

- Today
- Tomorrow
- Upcoming
- Proposed

Management Dashboard

- Summary
- Activity Summary
- Correspondence Report
- Department Summary

My Work

- White House Homepage
- Document Search
- Activities
- Calendar
- Queues
- Cases
- Reports
- Announcements

Constituents

- Orgs
- Contacts

Personalize Workplace ...

Workplace

Settings

Queues

Accept...

Letter: General Comment from Molly Dempsey - Windows Internet Explorer

Save and Close
 Follow Up
 Convert Activity
 View Document
 Actions



Letter

General Comment from Molly Dempsey

Letter Scanned Document Notes



20090709000033CE6DDocument 1.tif - KnowledgeLake Image Viewer

View

Annotations



1 / 9



27%



Rotate



Small

None

Page

Zoom

Rotate

Thumbnails

Bookmarks

July 7, 2009

Ms. Molly Dempsey
 2354 Frayne Ln
 Seattle, WA 27962
 Bus 555-0154
Molly.dempsey@example.com

Dear President Obama,

I want to personally congratulate you for the progress you and your administration have made with our economy.

Here in Seattle, housing costs are a major concern with families such as The Dempsey's. In King

Form Assistant

Follow Up

Create a Follow Up

Activity Type *

Task

Subject *

Due

Assign To *

Demo Administrator

Save

Save and Open

Tips

When you select a follow up, it is automatically associated with the open record or activity.

Status: Open

- ▶ Audit Tracking, Visibility and Accountability
 - Single Enterprise-wide Audit Management System
 - By User
 - By Audit Source (OIG, GAO, OMB...)
 - By Audit Type (IT, Financial, Management Challenges...)
 - By Recommendation
 - Metrics – Specifically Level of Effort in Days per Audit/Source
 - Elimination of “fence tossing” of activities
 - Leveraging Investment in SharePoint Infrastructure – No new costs!
 - Brings transparency to auditing and addresses Agency/Department “pain points”
 - Templates available “out of the box” to other Agencies/Departments
- 



Programs and services to help you start, grow and succeed.

Audit Home Recommendations

Search

- Recommendations
- Dashboard
- My Tasks
- My Recommendations
- Print Reports
- New Recommendations

[All](#)
[FOIA](#)
[GAO](#)
[Grid](#)
[Kearney](#)
[KPMG](#)
[OCFO](#)
[OIG](#)
[OMB](#)
[Other](#)
[SBA MGMT](#)

Recommendations

Title	Risk Category	Audit Report Number	Recommendation Number	Owner	Recommendation Status	Expected Completion Date	Details Link
+ Audit Source : GAO (7)							
+ Audit Source : Grid (2)							
+ Audit Source : Kearney (9)							
+ Audit Source : OCFO (4)							
+ Audit Source : OIG (43)							
+ Audit Source : OMB (17)							
+ Audit Source : OTHER (6)							
+ Audit Source : SBA MGMT (2)							
+ Add new item							

Recommendations

All

FOIA

GAO

Grid

Kearney

KPMG

OCFO

OTG

OMB

Other

SBA MGMT

Dashboard

My Tasks

My Recommendations

Print Reports

New Recommendations

Recommendations

Title	Risk Category	Audit Report Number	Recommendation Number	Owner	Recommendation Status	Expected Completion Date	Details Link
SBA's Implementation Of An HSPD-12 Card Issuance System	Technology Systems	09-01	05	Matthews, Ethel M.	Closed	9/17/2009	Go to Recommendation
Selected SBA General Support Operating Systems	Technology Systems	04-41	13	McCauley, David L.	Closed	10/30/2009	Go to Recommendation
SBA's Information System Controls for FY 2004	Technology Systems	05-12	2I	McCauley, David L.	Closed	12/15/2009	Go to Recommendation
Vulnerability Technology Security Assessment	Technology Systems	07-16	7	Farmer, Darryl A.	Closed	9/16/2009	Go to Recommendation
Planning for the Loan Management and Accounting System Modernization and Development Effort	Technology Systems	08-13	2	Whalen, Ronald D.	At Risk	2/12/2010	Go to Recommendation
Planning for the Loan Management and Accounting System Modernization and Development Effort	Technology Systems	08-13	3	Francis, Chet C.	Closed	12/15/2009	Go to Recommendation
Audit of SBA's 2008 Financial Statements	Technology Systems	09-03	1	McCauley, David L.	At Risk	10/20/2009	Go to Recommendation
Audit of SBA's 2008 Financial Statements	Technology Systems	09-03	02	McCauley, David L.	At Risk	11/10/2009	Go to Recommendation
Audit of SBA's 2008 Financial Statements	Technology Systems	09-03	03	McCauley, David L.	At Risk	11/10/2009	Go to Recommendation
Audit of SBA's 2008 Financial Statements	Technology Systems	09-03	04	McCauley, David L.	Closed	9/23/2009	Go to Recommendation
Audit of SBA's 2008 Financial Statements	Technology Systems	09-03	09	Christy, Paul T.	Closed	12/1/2009	Go to Recommendation
Audit of SBA's 2008 Financial Statements	Technology Systems	09-03	11	Christy, Paul T.	Closed	8/28/2009	Go to Recommendation
Audit of SBA's 2008 Financial Statements	Technology Systems	09-03	13	McCauley, David L.	Closed	11/17/2009	Go to Recommendation
System Access By Contractors Without Security Clearances	Technology Systems	09-07	1	McCauley, David L.	Closed	9/23/2009	Go to Recommendation
System Access By Contractors Without Security Clearances	Technology Systems	09-07	3	McCauley, David L.	Closed	9/19/2009	Go to Recommendation
System Access By Contractors Without Security Clearances	Technology Systems	09-07	4	McCauley, David L.	Closed	9/23/2009	Go to Recommendation
Audit of SBA's 2008 Financial Statements	Technology Systems	09-03	06	Christy, Paul T.	Closed	7/15/2009	Go to Recommendation
SBA's Information System Controls for FY 2004	Technology Systems	05-12	4C	Farmer, Darryl A.	Closed	8/12/2009	Go to Recommendation
System Access By Contractors Without Security Clearances	Technology	09-07	5	McCauley,	Closed	7/16/2009	Go to

Home

Documents

Tasks

Calendar

Contacts

Recommendation Details

Audit Group#:	OIG	Audit Report#:	09-01
Audit Source:	OIG	Recommendation Status:	Closed
Recommendation#:	05	Actual-Human Resource Effort In Days:	97
Date Received:	9/11/2008 12:00:00 AM	Remaining Effort in Days:	0
Due Date:	6/30/2009 12:00:00 AM	Original Estimate-Human Resource Effort In Days:	149
Functional Responsibility:	OCIO	Current Estimate-Human Resource Effort in Days:	97
Title:	SBA's Implementation Of An HSPD-12 Card Issuance System		
Recommendations:	Recommend the CIO complete an Exhibit 300, Capital Asset Plan and Business Case, for IDMS to establish a baseline plan for accomplishment of the project's objectives, and submit it to OMB as required. 9/17/2009; 300 was completed by the HSPD-12 team and submitted to PES.		
Owner:	Matthews, Ethel M.	Request to Reassign Recommendation	

Recommendation Task

	Title	Assigned To	Task Status	Due Date	Description	Remarks	Modified	Remaining Effort In Days
	Submit draft HSPD-12 Exh 300	Christian, Trisha	Completed	6/30/2009	On 3/25/2009 the draft 300 was submitted to IT Security.	The new due date is 9/30/2009	12/4/2009 9:25 AM	
	Award contract for HSPD-12	Christian, Trisha	Completed		The contract was awarded on 8/31/2009.	Working with M&A	12/4/2009 9:26 AM	
	Send HSPD-12 300 to M&A for final approval	Etheridge, Kenneth T.	Completed	9/21/2009	Awaiting approval from M & A.	9/14/09-Awaiting approval from M & A. 9/21/09 - Coordinated the Exhibit 300 with the HSPD-12 team, finalized the report and forwarded it to PES on Thursday, 9/17/09.	1/12/2010 10:15 AM	

Add new item

Supporting Documents

Type	Name	Modified By
	GFAQ_2009-11-20_16_27_00_427	Wise, Anthony L. (Contractor)
	No comments - Draft Small_Business_Administration_HSPD12_Implementation_Planv2	Payton, Ravoyne J.
	E300_Budget_Workbook_-_PKI_SME_Services	Payton, Ravoyne J.
	E300_Budget_Workbook_-_Post_Implementation_Review_Services	Payton, Ravoyne J.
	E300_Budget_Workbook_-_Program_Management_Office	Payton, Ravoyne J.
	E300_Budget_Workbook_-_Security_Accreditation_Services	Payton, Ravoyne J.
	E300_Budget_Workbook_-_Working_Group_and_Tiger_Team_Coordina	Payton, Ravoyne J.

Trend Analysis Summary

Status	This Week	Last Week	Two Weeks Ago	Three Weeks Ago	Four Weeks Ago	Five Weeks Ago	Six Weeks Ago	Seven Weeks Ago
At Risk	10	10	9	9	10	11	15	16
Closed	55	53	50	49	47	39	34	32
On Hold	0	0	0	0	0	0	0	1
On Track	20	24	27	29	24	22	11	12
Submitted	2	1	4	3	4	4	6	6

Historical Trend by Owner

Status	This Week	Last Week	Two Weeks Ago	Three Weeks Ago	Four Weeks Ago	Five Weeks Ago	Six Weeks Ago	Seven Weeks Ago
--------	-----------	-----------	---------------	-----------------	----------------	----------------	---------------	-----------------

Name : Bennett, Steven (Contractor) (1)

On Track	0	0	0	0	0	0	0	0
----------	---	---	---	---	---	---	---	---

Name : Christian, Trisha (4)

Closed	4	4	4	4	4	3	3	3
On Track	0	1	1	1	1	1	0	0
At Risk	1	0	0	0	0	0	0	0
Submitted	0	0	0	0	0	1	1	1

Name : Christy, Paul T. (4)

Closed	5	6	5	5	5	2	2	2
On Track	1	1	1	2	2	0	1	1
At Risk	0	0	0	0	0	0	0	0
Submitted	1	0	1	0	0	1	0	0

Name : Farmer, Darryl A. (1)

Closed	2	2	2	2	2	2	2	2
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Name : Francis, Chet C. (5)

On Track	0	0	0	0	0	0	0	0
Submitted	0	0	2	2	2	2	2	2
At Risk	0	0	0	0	1	1	2	1
On Hold	0	0	0	0	0	0	0	1
Closed	4	4	2	2	1	1	0	0

Name : Gupta, Gautam (Contractor) (1)

At Risk	0	0	0	0	0	0	0	1
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Name : Hill, Sherry C. (1)

On Track	1	1	1	1	1	1	1	1
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Name : Lewis, Joyce A. (3)

Closed	0	0	0	0	0	0	0	0
On Track	0	0	0	0	0	0	0	0
At Risk	0	0	0	0	0	0	0	0

Name : Matthews, Ethel M. (3)

Closed	6	6	6	6	6	6	6	6
On Track	0	0	0	0	0	0	0	0
At Risk	0	0	0	0	0	0	0	0

Name : McCauley, David L. (5)

At Risk	6	7	7	6	6	6	9	10
Closed	22	19	19	19	19	16	12	10

Snapshot Timestamps

Week	TimeStamp
This Week	1/13/2010 2:00 AM
Last Week	1/6/2010 2:00 AM
Two Weeks Ago	12/30/2009 2:00 AM
Three Weeks Ago	12/23/2009 2:00 AM
Four Weeks Ago	12/16/2009 2:00 AM
Five Weeks Ago	12/9/2009 2:00 AM
Six Weeks Ago	12/2/2009 2:00 AM
Seven Weeks Ago	11/25/2009 2:00 AM

Recommendations Overview Trend by Source Trend by Owner Details

Dashboard

My Tasks

My Recommendations

Print Reports

New Recommendations

Overdue Tasks

Task	Start Date	Assigned To	Recommendation Link
Disaster IPv6 Equipment Installation Close Out Meeting	2009-12-18 00:00:00	Hill, Sherry C.	Go to Recommendation
Update Status for SLA Language	2009-09-01 00:00:00		Go to Recommendation
Task1	2009-12-03 00:00:00	McCauley, David L.	Go to Recommendation
Follow Up participation in Web 2.0 Security Working Group	2009-09-01 00:00:00	McCauley, David L.	Go to Recommendation
Review of allegations concerning how the loan management and accounting system modernization project is being managed	2009-09-14 00:00:00	Francis, Chet C.	Go to Recommendation
Update Status for SLA Language	2009-09-01 00:00:00		Go to Recommendation
Update 9-03 13	2009-09-01 00:00:00		Go to Recommendation
Initiate a datacall to SBA Program offices	2009-12-02 00:00:00	Christian, Trisha	Go to Recommendation
OCIO Director's Review	2010-01-13 00:00:00	Christian, Trisha	Go to Recommendation
OIG Follow up	2010-01-06 00:00:00	Farmer, Darryl A.	Go to Recommendation

Recommendations By Due Date

Title	Owner	Expected Completion Date	Recommendation Due Date
SBA's Implementation Of An HSPD-12 Card Issuance System	Matthews, Ethel M.	9/17/2009	6/30/2009
Selected SBA General Support Operating Systems	McCauley, David L.	10/30/2009	11/20/2009
SBA's Information System Controls for FY 2004	McCauley, David L.	12/15/2009	4/15/2006
Vulnerability Technology Security Assessment	Farmer, Darryl A.	9/16/2009	
Planning for the Loan Management and Accounting System Modernization and Development Effort	Walen, Ronald D.	2/12/2010	4/24/2009
Planning for the Loan Management and Accounting System Modernization and Development Effort	Francis, Chet C.	12/15/2009	4/30/2009
Audit of SBA's 2008 Financial Statements	McCauley, David L.	10/20/2009	7/30/2009

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Add new item

Recommendations By Owner And Status

Title	Audit Report Number	Recommendation Number	Recommendation Due Date	Owner	Recommendation Status	Details Link
Owner: Christian, Trisha (5)						
Owner: Christy, Paul T. (7)						
Owner: Farmer, Darryl A. (2)						
Owner: Francis, Chet C. (4)						
Owner: Hill, Sherry C. (1)						
Owner: Matthews, Ethel M. (6)						
Owner: McCauley, David L. (47)						
Recommendation Status: At Risk (5)						
Recommendation Status: Closed (24)						
Recommendation Status: On Track (17)						
Recommendation Status: Submitted (1)						
Owner: Pickens, Rusty D. (1)						
Owner: Ray, Jacqueline (7)						
Owner: Shan, Yen H. (2)						

1 - 10

Recommendations By Source And Status

Title	Audit Report Number	Recommendation Number	Recommendation Due Date	Owner	Recommendation Status	Details Link
Audit Source: GAO (7)						
Audit Source: Grid (2)						
Audit Source: Kearney (9)						
Audit Source: OCFD (4)						
Audit Source: OIG (43)						
Audit Source: OMB (17)						
Audit Source: OTHER (6)						
Audit Source: SBA MGMT (2)						

- Recommendations
- Dashboard
- My Tasks
- My Recommendations
- Print Reports
- New Recommendations

Overview **Trend by Source** Trend by Owner Details

Date Range

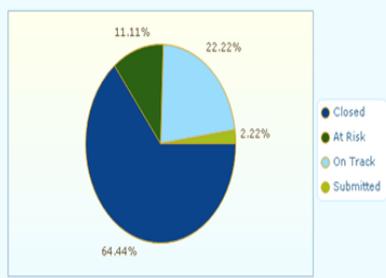
All Start Date: 1/19/2010 End Date: 1/19/2010

Note: The filter will be applied to the Recommendation Received Date.

Filter

Recommendations by Status

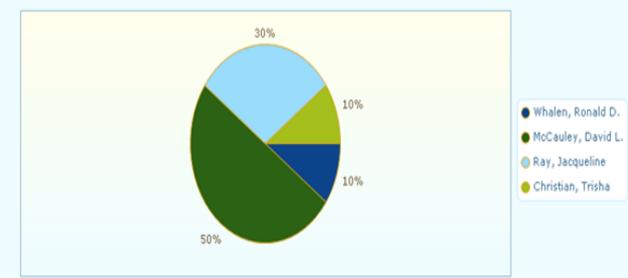
Modify Selection



Total Recommendations: 90

Recommendations by Owner

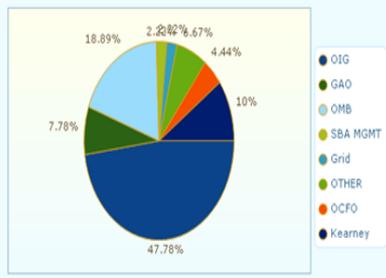
Modify Selection



Total Recommendations: 10

Recommendations by Source

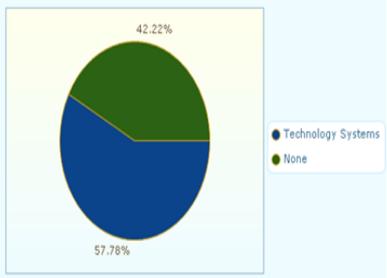
Modify Selection



Total Recommendations: 90

Recommendations by Risk Category

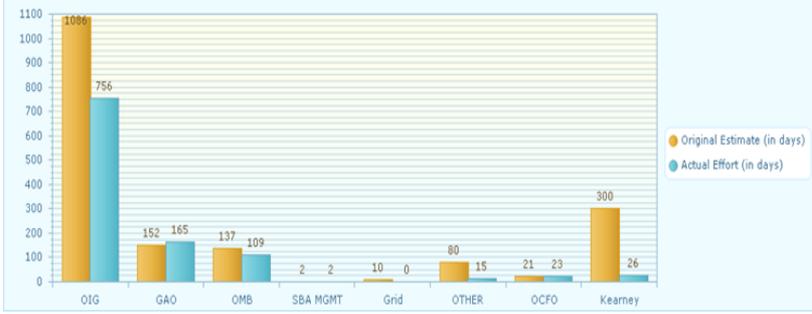
Modify Selection



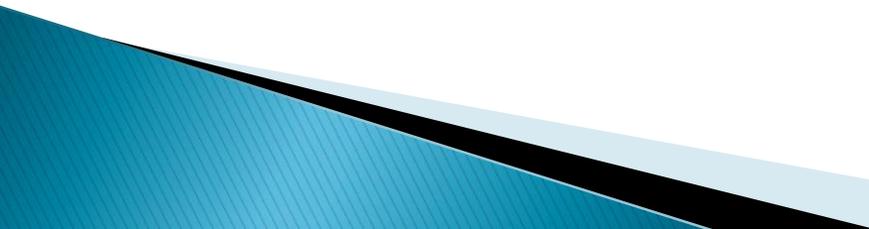
Total Recommendations: 90

Human Resource Effort in Days by Source

Modify Selection



Why does it matter to you?

- ▶ CRM – Visually Map Your Agency/Department Functional Areas
 - ▶ Executive Secretariat Correspondence Management “Built-in”
 - ▶ Audit Tracking, Visibility and Accountability Templates Available
 - ▶ Accelerated “Speed to Market”
 - Leverage SBA’s Experience and Configuration
 - Small Business Set Asides – 8a/HUBZone/Veteran... Reduced Procurement Time – 23% Small Business Goal
 - Maximizing existing technology investment (Outlook, SQL Server, SharePoint, etc.)
 - ▶ Rapid COTS Deployment Model
 - ▶ Low Risk / High Value
 - ▶ Knock Down Functional/Data Silos or Stove Pipes
 - ▶ Reduce Rogue Systems
 - ▶ Actually able to “do more with less” and accomplish transparency, collaboration, and efficiency
 - ▶ Using Technology to help *DRIVE* Change Culture
- 



Questions & Answers



Thank you!