



Success Story

TD Bank Upgrades Their Commercial Lending System Using Shaw Systems' Remote Delivery Option

BACKGROUND: TD Bank partnered with Shaw Systems to deliver an upgrade to their Shaw **COMMERCIAL**™ platform, from Release 4.7 to 5.1, via **vSo**, Shaw's remote delivery option. The bank's confidence in Shaw to deliver a timely and accurate solution was earned over four previously successful projects:

- (1) TD Banknorth conversion to **COMMERCIAL** v4.7
- (2) Conversion of Hudson Bank commercial portfolio
- (3) Development of Shaw/Provenir interface, and
- (4) Conversion of Commerce Bank's commercial portfolio

PROJECT: The project was divided into the following distinct phases:

Phase 1: Operational Analysis – During this phase, Shaw subject matter experts worked with TD Bank loan operations personnel to evaluate the bank's current operational procedures in an effort to maximize productivity through Shaw's **COMMERCIAL** application. Current procedures were compared to industry best practices, all manual and automated processes were reviewed, and impacts of under-utilized Shaw functionality were detailed.

Phase 2: Test Script Development – Shaw worked with key TD Bank personnel to develop a thorough set of test cases in preparation for their in-house code retrofit.

Phase 3: Base Upgrade – Utilizing vSo, Shaw's remote delivery option, Shaw project team resources completed the necessary upgrade tasks and unit testing to confirm a successful upgrade to Shaw base functionality for v5.1.

Phase 4: TD Bank in-house code retrofit – TD Bank's in-house code was then retrofitted to base v5.1, including the required adjustments to TD Bank interfaces.

Phase 5: System Turnover – The finalized upgrade was packaged and delivered to TD Bank in preparation for Quality Assurance testing.

Phase 6: Testing Support and Conversion – Key Shaw resources remained assigned to TD Bank through QA testing. Shaw subject matter experts provided operational support, trained users, updated system and operational documentation, and were onsite to support live conversion.

RESULT: SUCCESSFUL UPGRADE!

TD Bank successfully upgraded to Shaw **COMMERCIAL** v5.1. The Shaw project team **delivered the upgrade on schedule and 22% under the original project estimates**. TD Bank senior executives cited the "outstanding work" during "one of the smoothest implementations in the past 2 years."