

Portfolio



CGI

A monthly newsletter for Wealth Portfolio Solutions

Issue 5, July 2015

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The aim of Portfolio is to share key business and operational updates, recognize members and announce the latest social events and activities. It's important to us at CGI to recognize one another for a job well done and to keep up with recent news from our various teams.

Do you have any news for next month's issue? Contact [Snow Murdock](#) to submit your story.

1 STAYING UP TO DATE



Tweet, tweet!



Staying up to date is important, especially for a large team like WPS. So if you haven't already, start following [Wayne Hong](#) on Twitter to get the latest updates and news on WPS!

Note: For access to this page, you must submit a request on Twitter and have it approved. To request access, click [here](#).

Making Wayne's world viral!

That's right, you can now watch the WPS town hall online in HD! So if you weren't able to make it back in June, [watch it here on Youtube!](#) You can also get a copy of the PowerPoint [here](#).



MPower

Upgrade & Environment Merge – RBC & Scotia

The upgrade and environment merge project for Scotia is on the way to being approved. We are in the contract wording phase now and are expecting final approval in the next few weeks, which should allow the project to start on August 4.

The RBC upgrade and merge project is also in the approval stage. We have heard that it has already been approved at

A flash of innovation

Take a break from all that's happening at CGI and check out this article about [finding the key to delivering continuous innovation](#).

Any business can be affected by the rapidly changing conditions of its operating environment. If developers, company leaders, operations and security teams aren't working together towards continuous innovation in software, a business could be facing danger. For a company like CGI, which operates in a fast-moving market, innovation is becoming increasingly more essential as the speed of business accelerates.



User Workshop – June Edition

On June 18, another user workshop was hosted to focus on **financial planning, LYC, proposal and IPS generation**. This workshop welcomed our friends from **Crealogix**, who presented their LifePlanner product, which is a financial planning proposal and IPS generation tool. This provided the audience with an opportunity to see a demonstration of LifePlanner, learn CGI's plan for integration with Wealth360 and give them comments and feedback. The June workshop

some levels within the bank, so this is looking promising. The main project would start in November, but we have an early start phase that would begin in August.

When the Scotia and RBC projects are approved, we will have a lot of work on the MPower side and will therefore be hiring both locally and in IGDC.

MPower Server Migration

We are just about to start the process of moving all MPower clients from the old Unix servers to the new blade servers running Linux and a newer version of Oracle. We are going to start the process of moving RBC 3P in mid-July, with the remaining clients to follow.

EPQ is officially live!

Amazing news! **As of July 1, EPQ is officially live** and the launch was quite successful!

We'd like to take this time to thank each and every member who helped with this huge project. The team completed the development of significant product enhancements and customizations, built client confidence through delivery of quality and executed a complex, time constrained, mid-year deployment with a never before transaction load from an IBM OSS legacy application.

As a result of everyone's dedication to the project, we had a successful mid-year deployment and smooth post go-live transition to operations. We also secured a long-term and large client for the eSettlement product. Everyone's efforts in getting EPQ live have both improved the eSettlement product's functionality and future marketability. Great job team!

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was a great success and we're all eagerly awaiting the next one!

Wealth360 5.1 Release

The 5.1 team is currently undertaking proof of concepts on Camunda, a workflow automation tool, and Revolution R, for a real-time valuation engine. Revolution R is a data analytics platform that is both cost-effective and high-performance. The statistics programming language, R, is the "#1 choice of data scientists and is supported by a vibrant and talented community of contributors." To read more about Revolution R, click [here](#).

In addition, work is progressing on web enablement activities, which will modernize the look and feel of the existing product. These and other features and changes in the upcoming release will help Wealth360 remain an industry-leading platform for our clients. Continue the great work, team!

MVest maintenance release

The MVest MR team continues to be very busy with:

- Two releases in Client UAT with deployment to production planned for late July and early August
- Two large releases in planning for early fall delivery to the client to test
- CRMII in testing with GA planned for end of July
- Another successful deployment to production for two critical defect fixes was also completed June 27, 2015.

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PROFILES: MICHELLE ANTHONY



Name

Michelle Anthony

Title

Service Delivery Manager

Birthday

December 10

Educational background

Programming and Information Technology
Business Administration, Accounting and Financial Services

Recent work experience at CGI

Been with Wealth Portfolio Solutions since I started at CGI (1999). Started as a Powerhouse programmer, moving towards an Account Management/SDM role working on clients: Burgundy, Gluskin, Goodman, TD Funds, Raymond James, and TD Wealth

Hobbies, interests and passions

Playing baseball, movies/cinema, my "NS" family

What do you like to do on weekends?

Get outside and be on the move. Whether it be shopping, yard work or visiting friends, keeping busy is my goal!

One word to describe yourself

Determined

Dream job when you were young

Police officer

If you could have dinner with anyone from the past or present, who would it be?

Angelina Jolie

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WORK & PLAY



Towers of marshmallows mean towers of fun!

...and bingo was the game, oh!

- Andrew Cooper
- Anuradha Chandrasekar

For living the value of “Partnership and Quality”

- Amil Kana
- Hassan Gazmouz
- Nitendra Shrestha
- Thomas Hansen
- Brian Langendock
- Mike O’Riley
- Rajesh Bajracharya
- Robert McCrimmon
- Wayne Hong
- Garry Grajales

For living the value of “Corporate Social Responsibility”

- Amanda Myers
- Claudia Straka
- Sharon Cameron
- Heather Loizides
- Norine Kiddie
- Snow Murdock

For living the value of “Objectivity and Integrity”

- Amanda Myers
- Henry Gu
- Thomas Hansen
- Frances Ma
- Jean Laplante

Bravo!

Bravo Ruth Jakob!

First nomination: Thank you for your dedication and hard work during the RBC Frame and Proposal. Your effort, creative problem-solving and critical thinking are key success factors that allowed CGI to achieve this milestone. You are truly living the CGI values and we appreciate your continued contribution to the overall success of CGI.

Second nomination: Thank you for your contributions on the RBC MPower Consolidation Roadmap and Proposal. You did a great job in balancing client and CGI demands. To RBC you were a “ray of sunshine,” and I appreciated your patience in dealing with my constant requests (“just two more things”).

Bravo Ruth Jakob, Michelle Anthony, Anne Tan, Igor Savichev, and Prabhavathi Metla!

Thank you for your excellent work and attention to detail on the TD FATCA project. This project was a complete success which helps CGI’s reputation at TD. The client was very happy and gave us a 9.92 CSAP score.

us expand our footprint in Global Wealth consulting.

Bravo Norine Kiddie!

Client satisfaction is Norine’s top priority. The TD Portfolio Management team appreciates the dedication she demonstrates while working extra hours, such as evenings and weekends, to support the client (specifically QPR’s & ROC).

Impact

Congratulations Jane Deshane!

Jane is an exemplary ambassador for CGI Wealth360™, Portfolio Solutions and a role model for the organization. She is a **natural leader in contributing to the Product Roadmap**, amongst the first to conduct R&D against our competition and provide recommendations on where our product should be headed. She **works tirelessly in preparing product overviews for clients**, user group sessions (including R5.0 demos) and sales collateral, **all while supporting her peers and leadership team**.

As a result of Jane’s efforts, we have best-in-class client overviews, meaningful demos that tell a story for our clients, reusable sales collateral and a product strategy that is **putting us ahead of our competitors**.

Quarterly results

Here are some final results from Q3:

Final counts for Q3

Total Applaud awards: 69
Total Bravo! Awards: 17

June had the most Bravo awards in Q3, with 12 nominations!

Congratulations to these members for having the highest number of Applauds in Q3!

- Snow Murdock
- Claudia Straka

Congratulations to Ruth Jakob for having the highest number of Bravos in Q3!

What’s the difference between these awards? How do I nominate someone?

Applaud

Did someone go above and beyond for you today? Submit an Applaud nomination! These hardworking members will be included in next month’s issue of Portfolio and will be emailed a certificate, no approvals required!

How to nominate someone for an Applaud

1. Select this [link](#)
2. Click on the value you wish to recognize.
3. You’ll be directed to a form to enter the member’s name and a message as to why you are nominating them.

Bravo!

Do you know someone who makes a contribution day after day and deserves a little something more? Give them a Bravo! Those nominated will be included in next month’s issue of Portfolio and will receive a certificate and Vpass.

How to nominate someone for a Bravo!

1. Complete this [form](#) and submit it to your colleague’s manager.
2. Once approved, the Bravo! certificate will be sent to the manager, who will present it to the nominee.
3. The nominee will receive an email with a Vpass certificate number and instructions on logging onto the site and exchanging the Vpass for gift certificates

Impact

Do you know of a team or individual who exemplifies CGI’s values and stands out as a true leader who’s making a difference in our business? Nominate them for an Impact award! Winners will be included in the following issue of

How to nominate someone for an Impact:

Send an email to your director with the information below, and the director will forward the nomination to the [CGI GTA Impact Award Committee](#).

Portfolio and will receive an award.

Note: Approval required by the GTA Leadership Team

- Nominee's name
- Period (start and end dates) during which the event/action happened
- Detailed description of the event/action
- Outcome of the event/action
- CGI value that you believe is aligned with the event/action

Deadlines for nominations are July 7 and September 7.

Still have questions? Please consult the [CGI Recognition Brochure](#).

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5 WELCOMES & FAREWELLS



Give a warm CGI welcome to...



Faria Umar | Senior Consultant, MPower

Faria is a recent MBA graduate of the Rotman School of Management, with a major in accounting and finance. Prior to her MBA, she obtained her accounting designation (CMA) and has six years of experience spanning diverse industries, including education, biotechnology and financial services. Her most recent experience was working in Fund Accounting operations at IGM Financial Inc. on diverse investment portfolios and system enhancement projects.

Fun fact: Faria is an adventurous spirit. She did her first sky diving jump last year and recently completed the military designed obstacle course "Tough Mudder" and the "CN Tower Climb."



Caren Sarkissian | Director, Technical Architecture

Caren has been with CGI for about eight years now. He has had the opportunity to work with MRD, CSB, Insurance, Public and even Utilities. More often than not, he worked as a Solution or Technical Architect, however, he still likes coding and enjoys getting involved in detail troubleshooting. He's happy to be part of Wayne's group and is looking forward to working with the team. His primary focus will be to work with Mike O'Riley and the team on MPower.

Fun fact: Caren has been a swimmer for as long as he can remember and has been a qualified life guard since he was a teenager. Being an avid reader, he also aims to finish a book every month; his favourite (so far) is the "Hitchhiker's Guide to the Galaxy."

Farewell. Wishing you all the best of luck!

Christine Samuel | Senior UX Designer

"As the senior UX designer, Christine has been instrumental in transforming the look and feel of the Wealth360 5.0 product. We would like to wish her all the best in her future endeavors!"— Derek Fong, Director, Architecture

Shirlene But | Senior Consultant

"Shirlene is retiring at the end of July; she does not look old enough to me, but yes, Ms.RBC is retiring. We would like to thank her for all her hard work and dedication to keeping RBC happy and running smoothly. We are going to miss her and I'm sure RBC will, as well. Thank you, Shirlene, and enjoy your retirement!"— Mike O'Riley, Director, MPower

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Have a story or some news to share? Email [Snow Murdock](#) to have it included in next month's issue of Portfolio!

Founded in 1976, CGI is a global IT and business process services provider with 68,000 professionals delivering high-quality business consulting, systems integration and outsourcing services.

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