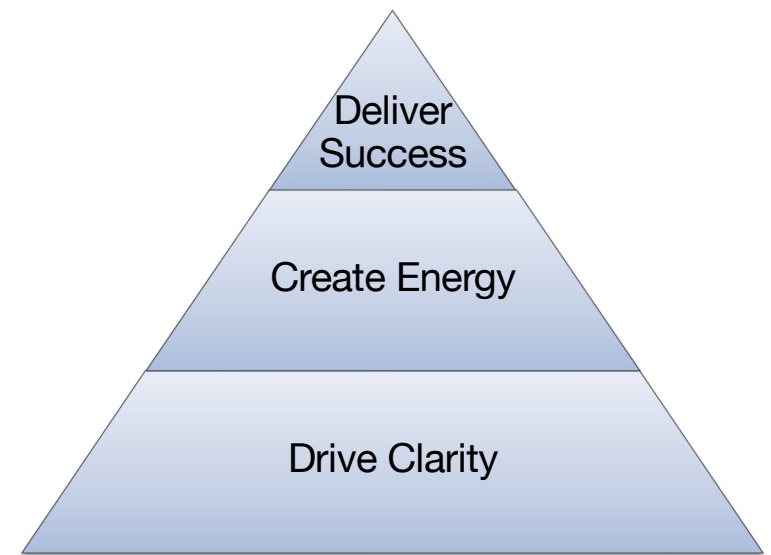


# Why Do Clients Choose EQengineered?

Drive Clarity. Create Energy. Deliver Success.

## Our Differentiators | Unique Value

- Technology and design know how.
- Data expertise.
- Consulting acumen.
- Delivery velocity and productivity.
- Value for your investment.



# Case Study | Software Modernization

## Business Challenge

Our client, an enterprise retail company, is interested in a partnership to assist to define a software/data architecture roadmap.

The priorities are to:

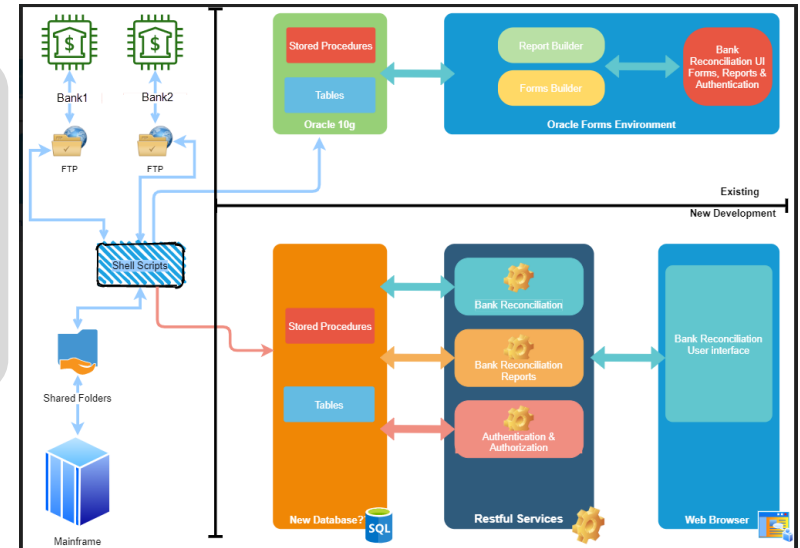
- Establish a next generation software and data architecture
- Retire outdated, obsolete and problematic applications/platforms
- Demonstrate that an Agile methodology can be trusted to rapidly deliver valuable outcome

Further challenges include:

- Limited documentation and lack of access to developers who initially wrote the aging applications
- Restricted access to end users forcing a backward re-engineering process
- Limited opportunities for data changes to prevent downstream systems impact

A core team consisting of a project manager and front and back end developers was brought in to deliver a proof-of-concept application to demonstrate that the technology used by the existing legacy application could be rapidly upgraded without causing a negative impact to the business

Combining high-level technical expertise with a proven process and close collaboration with our client resulted in a rapidly produced and modernized application



## EQengineered Approach

The EQengineered team worked as a dedicated product development group to organize and direct the work in the following ways:

- Conducted discovery of the legacy application to understand the functionality, navigation and look and feel.
- Utilized an Agile Scrum methodology to break down the work into small increments and apply continuous integrated development.
- Leading daily stand-ups, focused sprint planning and weekly demonstrations to increase the client's comfort with EQengineered deliverables
- Closed integration with Client's QA team to ensure unbiased validated results

## Business Results/Outcomes

The members of the EQengineered team were able to deliver the needed project outcome within 16 weeks resulting in an updated application using .NET and eliminating obsolete Oracle-forms 10g software.

The delivered application resulted in hosting new and improved functionality as EQengineered was able to collaborate with the application end audience.

Obsolete practices of printing paper reports were eliminated by providing a more efficient process.

Client IT team members learned from the EQengineered Agile method by attending the project's Agile ceremonies like daily standups, sprint planning, backlog refinements and demo sessions.



# Case Study | Data Business Solution

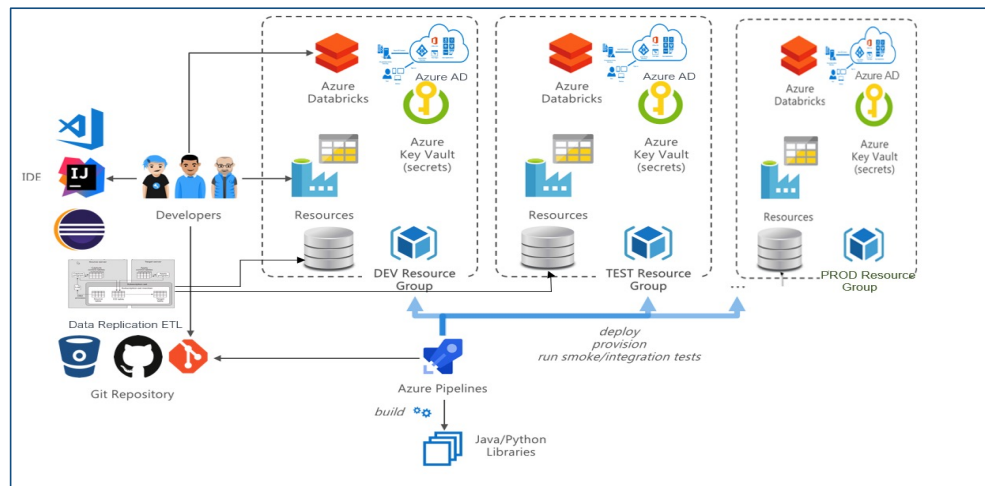
## Business Challenge

Our enterprise health plan client sought a partnership to build and launch a Machine Learning (ML), production ready Claims Decision Tool (CDT) to provides customer visualizations and analytics of claims data, reducing claims exposure.

The CDT tool serves important business functions and the top priority is making the MVP production ready first for internal users to meet immediate internal business needs, and then for several external audiences (and potentially other lines of business).

The current solution was developed by an R&D data team and suffers from a lack of application security, adherence to approved IT technology, and unstable environments to deliver quality software code and the data solution into production.

To accomplish the needed result, a core team including a project manager and two data architects/developers was created to collaborate with product owner to deliver a first-generation MVP solution within the timeline and hybrid application technology (on prem and cloud based mix), while also establishing the mid term enterprise grade delivery plan.



## EQengineered Approach

The EQengineered team worked as a dedicated data and software development team to organize and implement the solution by:

- Utilizing Agile Scrum methodology, breaking down the work in small increments and applying continuous integrated development
- Integrating with the product ownership, data and technology teams to prioritize and manage work to MVP delivery.
- Conducting daily stand-ups, focused sprint planning and bi-weekly demonstrations to improve client satisfaction with EQengineered deliverables
- Providing real time updates to executive leadership team through the currency of project artifacts and evolution of the project plan as needed based on the situation/progress to-date to ensure efficiency of delivery

## Business Results/Outcomes

The EQengineered team assisted our client deliver a fully functional CDT application using enterprise security and Azure pipeline for proper dev-test-stage-prod workflow in the MVP launch.

Client teams learned from the EQengineered Agile method by attending the Agile ceremonies like daily standups, sprint planning, backlog refinements and demo sessions.

The EQengineered team developed technology focus area reference software code proof of concepts for the on prem app and resulting cloud data infrastructure of the solution. EQengineered also provided recommendations developed for security, DevOps (on-prem and Azure Cloud), a democratized SDLC process, design (personas/customer journeys), new approved technologies, and an app cloud migration roadmap for an external enterprise grade solution that defines the sustainable long-term delivery plan.



# Case Study | Data and UI

## Business Challenge

Our client, an enterprise financial company, is interested in a partnership to build the first publicly accessible national abandoned property database.

The priorities are:

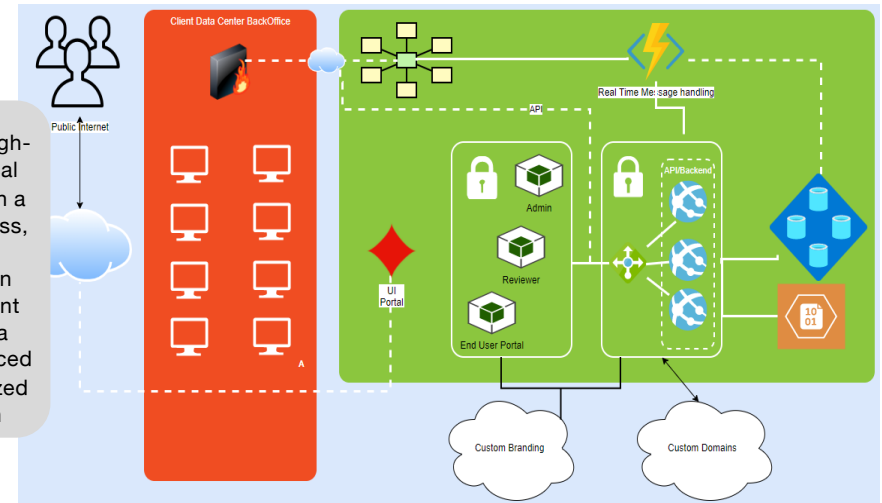
- Establish a secure, flexible, and performant software and data architecture.
- Improve transparency and decrease processing time for new claims
- Track and audit user claims for regulatory compliance

The following challenges are:

- Needed to handle highly sensitive PII
- Needed to communicate with multiple on-premises back-office installations in real time
- Multi-Tenant install, with guarantee of firewalled data
- User customizable color schema and graphics

To accomplish this, a core team of four developers was brought in to collaborate with project owners to deliver a first-generation application using .NET and an inhouse designed UI framework hosted in Azure cloud platform.

Combining high-level technical expertise with a proven process, and close collaboration with our Client resulted in a rapidly produced and modernized application



## EQengineered Approach

The EQengineered team worked as a dedicated product development team to organize and implement the software package in the following ways:

- Utilized an Agile Scrum methodology by breaking down the work in small increments and applied continuous integrated development
- Daily stand-ups, focused sprint planning and bi-weekly demonstrations raised the Client's comfort with EQengineered deliverables
- Close integration with the Client's product ownership team to prioritize work.
- Close integration with Client's QA team guaranteed unbiased validated results

## Business Results/Outcomes

Within 30 weeks of development, the members of the EQengineered Team were able to deliver a fully functional application using ASP.NET and Javascript hosted on Microsoft Azure Cloud platform.

The delivered application resulted in hosting new and improved functionality as EQengineered was able to involve the end user after all for limited encounters.

Old practices of mailing documents back and forth were eliminated by providing a more efficient process and transparent.

Other IT Teams learned from the EQengineered Agile method by attending the project's Agile ceremonies like daily standups, sprint planning, backlog refinements and demo sessions.



# Case Study | UI Framework

## Business Challenge

Our client, a large financial company, is interested in a partnership to improve the technology productivity, performance, and velocity of its custom User Interface (UI) Framework and deliver a version 1 solution to continue to enable growth and the ability of the enterprise to compete and thrive.

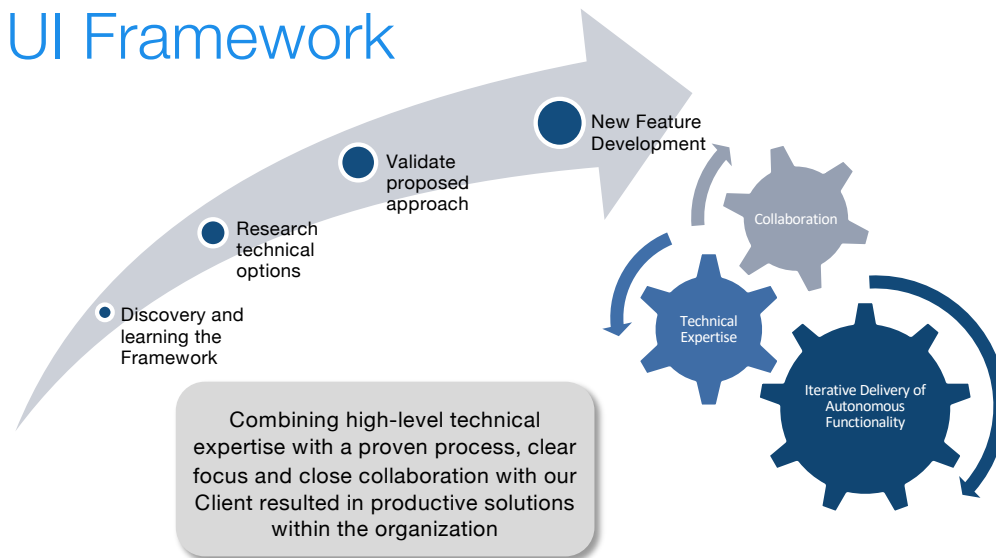
The framework is not yet at the level of established frameworks and has encountered challenges in the speed of delivery of applications, the ease of onboarding developers, the developer experience, and productivity. Additionally, some components need to be created or improved in order to meet the needs of applications which are intended to utilize the framework in the near future.

To accomplish this, a core team of four developers, one technical writer and one project manager, was brought in to address complex technical challenges as well as increase the UI Framework's publicity and adoption by developers, designers and product owners within the company.

## EQengineered Approach

The EQengineered team worked as a dedicated product development group to organize and direct the work in the following ways:

- First learned the UI Framework by being given in-depth training by our Client and an opportunity to get hands-on by handling defects.
- Held meetings with key UI Framework owners and various stakeholders to understand, describe, and prioritize features and functionality.
- Created and collaborated on innovative technical solutions by researching potential approaches first.
- Demonstrated flexibility in developing needed fixes and providing prompt ROI
- Utilized Agile methodology by laying out clear directions and providing transparent incremental deliveries.
- Developed a detailed interactive tutorial to onboard developers to using the UI Framework
- Developed a centralized repository of information to promote the UI Framework through out the enterprise



## Business Results/Outcomes

The members of the EQengineered Team used their expertise very fluidly between the two parallel efforts: development and documentation.

Quick efficient development touchpoints with our Client's key technical experts allowed us to confirm/adjust our technical recommendations and approach.

Our Client appreciated our organized processes, transparency and technical expertise which resulted in a much more robust UI Framework.

The UI Framework tutorial resulted in an easier onboarding for new developers as well as a better appreciation for it.

A new website dedicated to the UI Framework provided a platform of information and knowledge for a varied audience made of developers, designers, product owners and executives.



# Case Study | Project Management - Agile Delivery

## Business Challenge

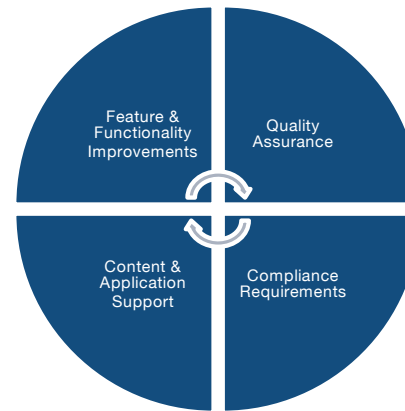
The tools that an organization uses are critically important to the successful management of projects and products the teams are responsible for. While an organization will undergo a comprehensive evaluation of a new tool, each team may require some additional adjustments in configuration in order to regain the level of productivity they enjoyed with the previous process. Adjustments to the new tool can introduce unforeseen friction points with third-party integrations that had been previously depended on in order to do daily tasks. However, there is the ability to also gain new insights into the organization, as new tools can often provide opportunities to capture and track new metrics that can greatly enhance planning initiatives.

Our client, an enterprise financial company, was utilizing a new SaaS application that was not yet configured in a way to provide critical data for planning and management of their product. They needed a way to manage and report on different types of support, development, deployment, and planning initiatives. As the organization's empirical data needs did not change with the shift to the new tool, tracking and extracting the necessary datapoints to fulfill existing reporting for senior leadership would need to be recalibrated.

## EQengineered Approach

The EQengineered team worked as a dedicated project management service to organize and direct the work in the following ways:

- Audited and assessed current workflow in legacy project management tools
- Produced a proposal for configuration of the new SaaS application to accomplish existing process, and worked with the client to apply those configurations
- Identified areas where the new SaaS tool could provide deeper levels of data to aid in planning and segmentation of work planned
- Provided comprehensive agile project management of the execution team tailored to their unique business needs
- Produced reporting and metrics in concordance with the client's existing needs and continuously looked for areas to improve and enhance data delivery



The application comprises of four different key focus areas that work together in order to deliver a high-quality application to users. Each focus area had dedicated team members that needed to collaborate consistently and with increasing velocity.

EQengineered worked to coordinate each focus area's process to ensure alignment, open communication, and execution.



## Business Results/Outcomes

By tailoring the agile project management methods to the team's unique needs and matching those efforts to the configurations of the SaaS application, the product manager was able to have increased visibility into the work being completed by the execution team and provide more accurate metrics to senior leadership. EQengineered was able to leverage the robust features available in the SaaS application to increase the automation of reporting and management, which reduced the daily overhead of work by the execution team to track their progress.

Thoughtful process improvements can provide a solid foundation for teams to innovate and grow. The client's team was able to introduce new team members quickly and efficiently, plan new feature delivery with better clarity into the level of effort required, and forecast support needs with more confidence and accuracy. This blueprint was able to be replicated across the organization with similar success.



# Case Study | Product Integration & Documentation

## Business Challenge

Internal applications can be a source of flexible and functional capabilities that are tailored for the organization that developed them. The organization has tremendous opportunity to customize a tool that fulfills a unique business need or process.

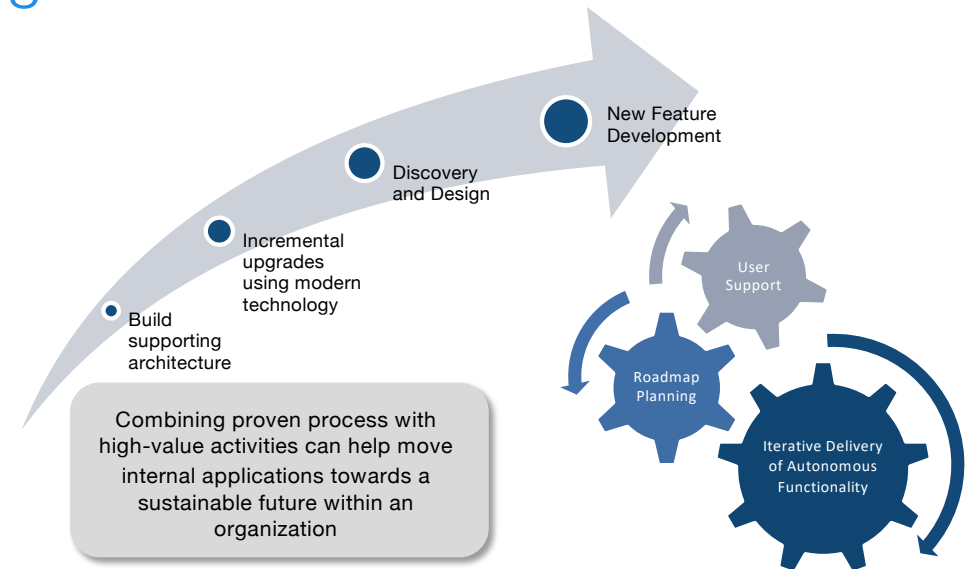
Managing the development of an internal application presents a set of challenges. Who is working on the vision and direction of development? Who is managing the team (or teams) making changes and how are the users supported?

Our client needed a way to manage the expectations of the users that engaged with this homegrown internal application on a daily basis and provide necessary features to extend the lifespan of this critical application. They needed to ensure uptime and integrations with other applications that consumed data from this essential service. Since there was no existing team that was dedicated to this effort, our client needed a team that would provide all necessary support and feature updates and enhance the application so that it could run with minimal development needs in the future.

## EQengineered Approach

The EQengineered team worked as a dedicated product development group to organize and direct the work in the following ways:

- Held meetings with key users and product stakeholders to understand, describe, and prioritize potential features and functionality
- Created and collaborated on innovative technical solutions that would eliminate future development touchpoints and automate key processes within the application
- Utilized agile methodology to iterate on the work and provide transparent views into release delivery through proven and tested processes
- Organized and maintained an effective documentation wiki to help provide clarity into previously opaque features and architecture for users, QA teams, and future development needs



## Business Results/Outcomes

The internal application is able to run with minimal development touchpoints, and includes necessary features and updates to extend the lifecycle of the application until business needs change. The focus on reduction of manual or development-heavy tasks has freed up significant time for the users of this internal application. The documentation and reporting that was completed during this engagement has served as a blueprint for future efforts at this client for organizing other teams and achieving similar results.

Additionally, this work provides a foundational and procedural roadmap for aligning interdepartmental teams on shared internal processes that will be critical for any future organization-led applications.



# Case Study | ML - NLP

## Business Challenge

For commercial transactions, in addition to filing state taxes at various levels like state, county, city. In addition, there can be special tax jurisdictions for every state applicable to entities like Fire, Police, Health, Library, Transportation, etc. The boundaries of special tax jurisdictions can be arbitrary and may not be related to any other geographic boundary, such as city limits or zip codes.

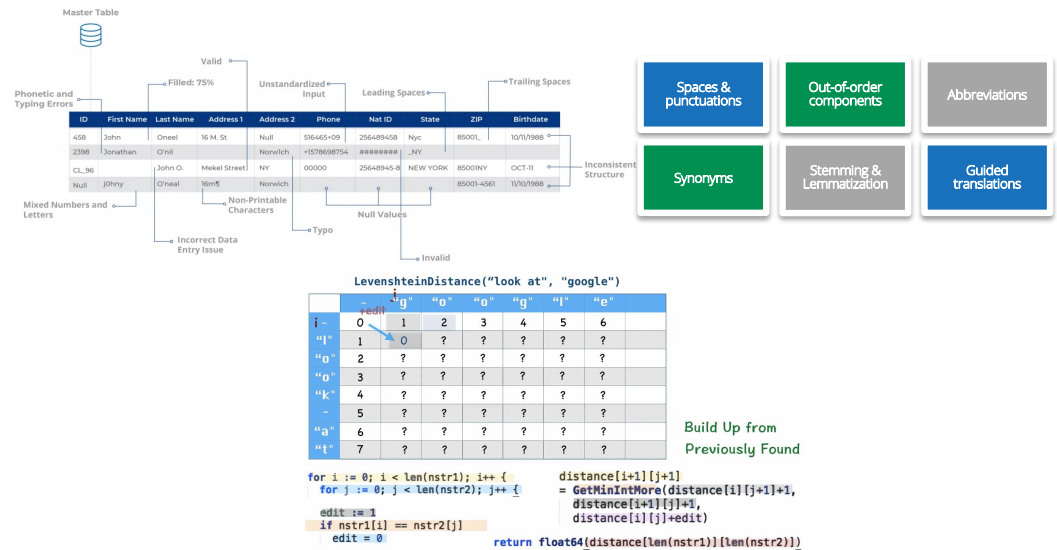
Since there is no standardized master data set for these jurisdictions across the government agencies, and the industry, extracting and mapping these STJ elements are very error prone and requires a lot of manual effort.

Our client, an enterprise financial services company, needed a way to extract the jurisdictions from various reports and invoices, and map them to its own target master set so it can apply taxes correctly to those, without extensive manual work.

## EQengineered Approach

The EQengineered data team developed an approach to identify special jurisdictions quickly and accurately from various source systems and map them to a target set, with minimal manual intervention. Some of the highlights of the approach are

- Use of NLP and fuzzy logic to automatically map from one set of jurisdiction names to another.
- Use of synonym dictionaries, weighting criteria, and state specific business rules to improve the overall accuracy of the mapping process.
- High-degree of configurability to adapt the solution to different sources of data.



## Business Results/Outcomes

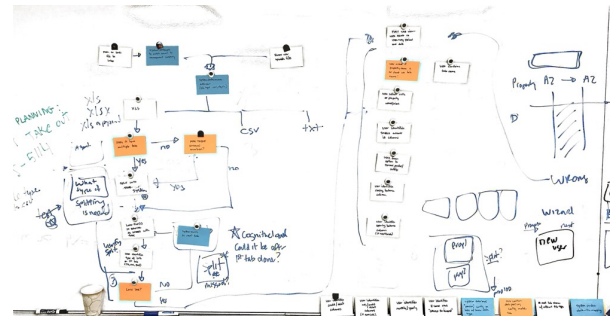
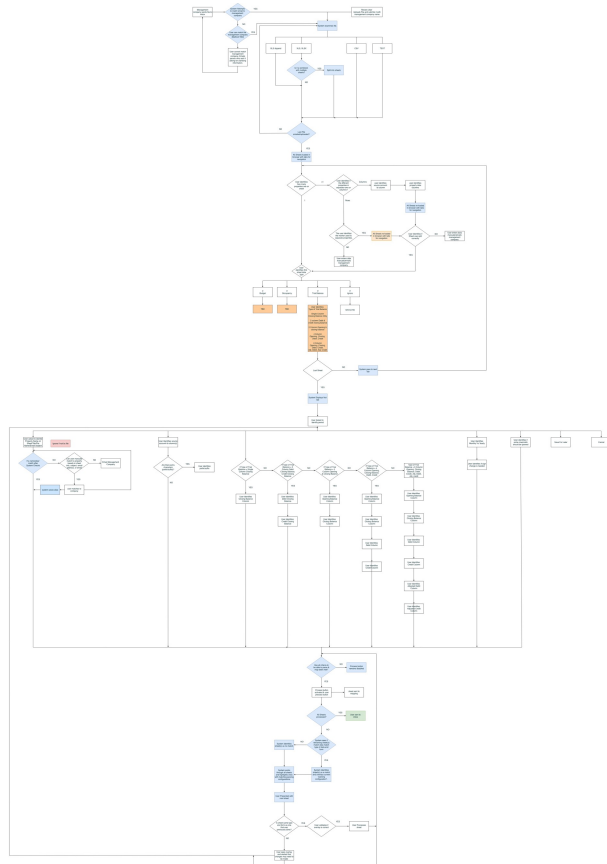
The mapping solution achieved mapping accuracy greater than 90% for most of the states that appeared in the source data sets.

This work provides a foundation for building a production-level solution including integration with multiple tax systems, both internal and external, periodic refresh of the special jurisdiction dictionary and configurations, and mapping business rules.

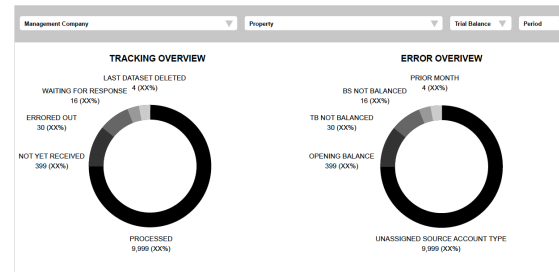


# Boston Capital / Lexington Solutions

## Data Ingestion Webapp



### Dashboard



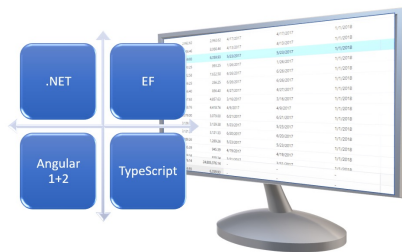
### Recent Errors

★ BALANCE SHEET NOT BALANCED — AUGUST 2018 Inverhills Housing Foundation Corporate — Total Balance — Garden Walk of Cary / Edgewood Place and Windsor Place Apartments	06/29/2018	+
★ ATTACHMENT TOO LARGE — PERIOD UNKNOWN Management Company Unknown Deal Type: Unknown Data Type: Unknown — Property Unknown	06/29/2018	+
★ MONTHLY TO YTD CHANGE — AUGUST 2018 Solar Enterprises, Inc. Corporate — Trial Balance — Monte Vista Apartments	06/29/2018	+

SHEET 1	SHEET 2	SHEET 3	SHEET 4	SHEET 5
FILE INFORMATION				
INBOX DATA				
File Name: Filename.xls				
Reporting Book: ABC/ABC				
Reporting Period: Prior Month				
As Of Date: 06/30/2018				
Location: Boston				
Account Name: Anson Street				
Account Number: 111000				
From: abc@abcmangementcompany.com				
Management Company: ABC Management Co.				
Subject: Anson Street				
OPEN EMAIL				
PARSING INFORMATION				
Data Type: Trial Balance				
Accounting Method: YTD				
SINGLE CELL IDENTIFICATION				
Property Name Location: Property Name Location				
Period: Period				
COLUMN IDENTIFICATION				
Source ID: Source ID				
Closing Balance: Closing Balance				
Debit Closing Balance: Debit Closing Balance				
Credit Closing Balance: Credit Closing Balance				
Opening Balance: Opening Balance				
Debit: Debit				
Credit: Credit				
Adjusted Debit: Adjusted Debit				
Adjusted Credit: Adjusted Credit				
GENERAL IDENTIFICATION				
Ignore Cells: Ignore Cells				
CANCEL PROCESS				

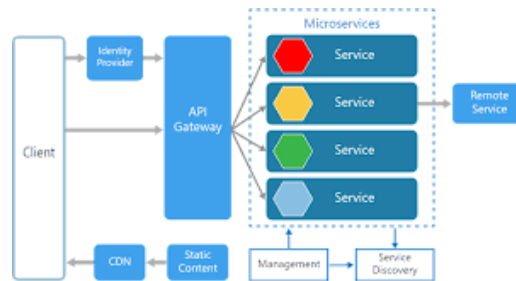
# Digital Product & Application Modernization

Microsoft .NET Technology Suite | Enterprise Financial Services Client



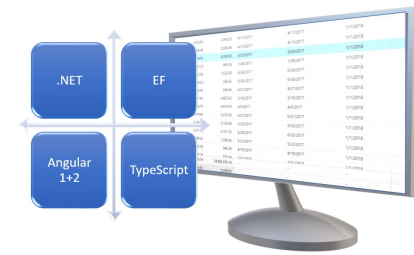
## Financial Software

Core Technologies:  
.NET 4.6.2 (C Sharp, Entity framework, and SQL Server),  
Angular 2.  
Core team | 78 weeks



## Certification Software

Core Technologies:  
.NET Core 3.0 (C Sharp, Entity framework, and SQL Server).  
Core team | 42 weeks



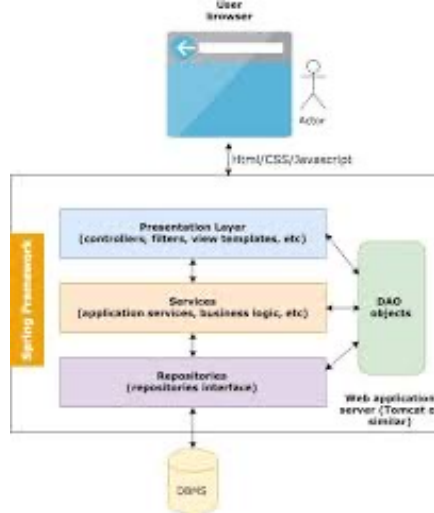
## Tax Management Software

Extension of original product team to ensure team efficiency, product launch velocity, and productivity.  
Core team | 26 weeks



# Digital Product & Application Modernization

Java Technology Suite | Python | Enterprise Asset Management Client



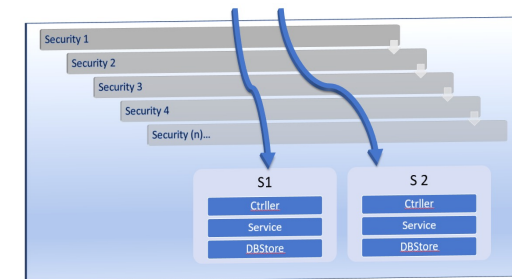
## Java Application Strategy, Design & Development

Java & design services support.  
Core team | 13 weeks

The screenshot shows a web application interface for editing a report. The title is 'Edit Parsing' and the subtitle is 'Northwest Real Estate Capital Corp'. The interface includes a 'Parsing Configuration' section with a dropdown for 'A1 User Monthly D-O' and a 'Clear' button. Below this is a 'Property Name' field with 'A1' selected, a 'Period' dropdown with 'A1' selected, and an 'Accounts' dropdown with 'A1' selected. There is also an 'Activity Period' section with a calendar view. The main part of the interface is a table with columns for 'Property Name', 'Period', and 'Accounts'. The table contains data for various properties and periods, including 'A1', 'A2', 'A3', 'A4', 'A5', 'A6', 'A7', 'A8', 'A9', 'A10', 'A11', 'A12', 'A13', 'A14', 'A15', 'A16', 'A17', 'A18', 'A19', 'A20', 'A21', 'A22', 'A23', 'A24', 'A25', 'A26', 'A27', 'A28', 'A29', 'A30', 'A31', 'A32', 'A33', 'A34', 'A35', 'A36', 'A37', 'A38', 'A39', 'A40', 'A41', 'A42', 'A43', 'A44', 'A45', 'A46', 'A47', 'A48', 'A49', 'A50', 'A51', 'A52', 'A53', 'A54', 'A55', 'A56', 'A57', 'A58', 'A59', 'A60', 'A61', 'A62', 'A63', 'A64', 'A65', 'A66', 'A67', 'A68', 'A69', 'A70', 'A71', 'A72', 'A73', 'A74', 'A75', 'A76', 'A77', 'A78', 'A79', 'A80', 'A81', 'A82', 'A83', 'A84', 'A85', 'A86', 'A87', 'A88', 'A89', 'A90', 'A91', 'A92', 'A93', 'A94', 'A95', 'A96', 'A97', 'A98', 'A99', 'A100'. The table also includes a 'Total' row at the bottom.

## Python Application Features | Functionality

Python application development  
/ modernization of core  
application features and  
functionality.  
Core team | 39 weeks



## Security Initiative

Java-Sprint / Rails Security.  
Project team | 12 weeks.



# Digital Product & Application Modernization

Client Case Studies



## **Hithr**

Groovy with Micronaut & MySQL user authentication system for an iOS application using Swift and Firebase.



## **Lexington Solutions/Boston Capital**

Java & Python application development/modernization of core application features and functionality.



## **Cerebral Palsy Foundation**

3 user groups / audience research, navigation / personalization / content consulting, focus group facilitation.

