

Meet Your Project Manager

Wayne Nguyen is a seasoned project manager with over **12 years of experience** at First American Mortgage Solutions. His expertise spans leading 100 projects, particularly in legacy system migrations and workflow automation. Wayne holds certifications in PMP, CSM, and Lean Six Sigma Black Belt, showcasing his commitment to professional excellence and thorough knowledge of project management methodologies. His background equips him to effectively manage complex projects across diverse environments.

In late 2023, Wayne made a strategic career pivot, taking a break to complete his Bachelor's Degree at UCI while transitioning to a supervisory role at UPS. This role allowed him the flexibility to finish his degree while gaining crucial operational discipline and experience in managing teams. Wayne is eager to leverage his skills and insights from both project leadership and operational accountability to drive meaningful project outcomes in his next role.



DTO TEXAS

Policy Rollout



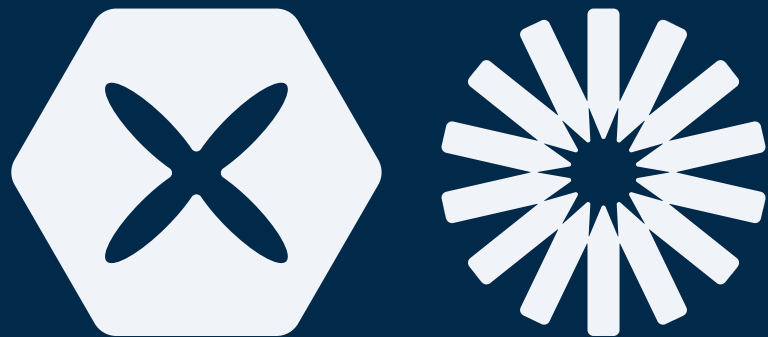
PRESENTED BY WAYNE NGUYEN, PMP, CSM, LSSB



Project Summary

Overview of the DTO Texas Policy Rollout

The DTO Texas Policy Rollout aimed to recover lost title insurance premiums by establishing a direct-issuance capability across all 249 Texas counties, enhancing operational efficiency.





Goals · Triple Constraints · PM Role – Setting the Foundation for Delivery

Project Goals

Recover 100% of title premiums across 249 TX counties. Build Wintrack automation end-to-end. Establish premium split model for 220 agency agents. Deliver self-sustaining operations – increase revenue, decrease overhead, zero compliance violations.

PM Role

Full resource authority across IT, billing, underwriting, compliance & 3 vendors. Critical Path Owner – CPM schedule, 15 milestones. Change Control Lead – 9 scope changes processed without scope creep. Vendor Relationship Manager – NPS, DataTrace, Allegiance Title. Stakeholder communicator – monthly sponsor reporting, weekly cross-functional reviews.

Triple Constraints

Scope: 249 counties · 2 phases · 10 deliverables · 9 change requests managed via formal CCB. Time: 12 months · Phase I +6 wk sponsor-approved variance · Phase II all milestones on schedule. Cost: No external budget – Revenue Justification Model · Zero additional headcount.

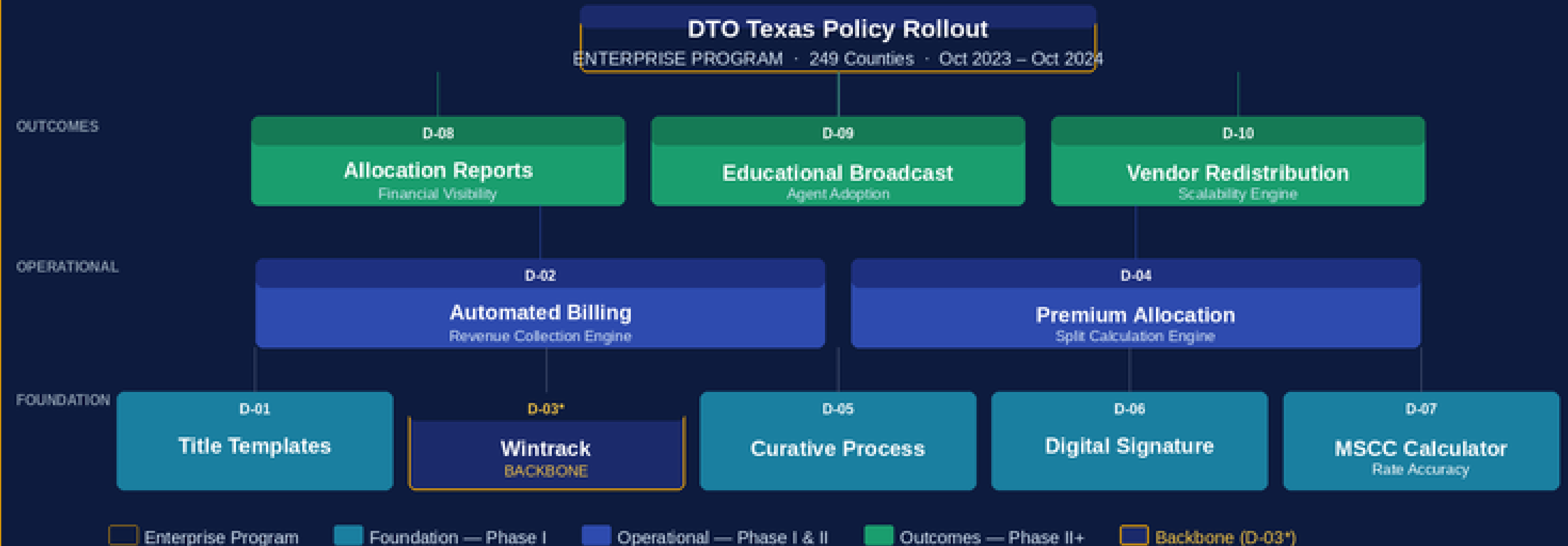
Stakeholder Engagement

3 project sponsors engaged at every phase gate. 220 Texas county agents onboarded – zero disengagement. DTO Billing Team cross-trained and fully self-sufficient post-launch. Weekly Texas Allocation Reports and monthly Finance Reports maintained throughout.

Hybrid Project Life Cycle



Program Architecture



Schedule - Ganett Chart

DTO Texas Policy Rollout – Gantt Chart			
October 2023 - October 2024 249 Counties 2 Phases			
Phase	Task / Milestone	Start	End
		Oct 2023	Nov 2023
Phase I	Project Initiation		
Phase I	Determine Phase I States		
Phase I	Complete Financial Analysis		
Phase I	Create Phase I Process Flow		
Phase I	Vitrack, Workflow & Automation		
Phase I	Billing Integration		
Phase I	Signature Process Integration		
Phase I	Template Validation (T7/T2)		
Phase I	County Readiness Reviews		
Phase I	PHASE I GO-LIVE (29 CPU Counties)		
Phase II	Phase II Planning & Financial Analysis		
Phase II	Vitrack, Phase II Automation		
Phase II	Agent Contact Loading (220 Counties)		
Phase II	Premium Split Configuration		
Phase II	7 High-Volume Counties Go-Live		
Phase II	213 Remaining Counties Go-Live		
Phase II	MSCC Calculator Update		
Phase II	Offshore Premium Calc Process		
Phase II	CPU Redistribution (NPS/Data Trace)		
Phase II	P24 Redistribution (Allegiance Title)		
Close	Educational Broadcast to Agents		
Close	Project Completion & Formal Close		
Legend:	Phase I	Phase II	Close

Outcomes Metrics

Key Performance Indicators at project close

This visual dashboard highlights **critical metrics** achieved during the project, demonstrating success in deployment and compliance.





Business Impact

Revenue: Recovered lost premiums across all 249 Texas counties, positively impacting overall financial performance.

Operations

Self-Sustaining: Established an operational model that requires zero IT dependency post-project close, enhancing efficiency.

Underwriting

Increased Leverage: Introduced T7 and T2 templates, ensuring compliance and maintaining zero violations across all operations.

Agent Relations

Onboarded Agents: Successfully engaged all 220 agents with zero disengagements, strengthening relationships and operational trust.

Key Business Impact Areas



What Went Well

The **staged rollout strategy** minimized disruption and ensured smoother transitions across multiple counties during implementation.

What to Improve

Earlier financial analysis is crucial for **identifying potential issues** and ensuring timely resource allocation prior to go-live.

Lessons Learned Overview



Regulatory

Five ALTA-restricted counties required separate NPS TEN vendor paths, excluded from scope through sponsor-approved change control.

Vendor Complexity

Mid-project redistribution of NPS to DataTrace in August 2024 ensured zero disruption during the transition.

Tech Adoption

Wintrack was developed from scratch to serve as the backbone for automation across all 249 counties.

Financial Discipline

The revenue justification model not only increased revenue but also decreased overhead, ensuring financial stability.

Special Highlights Overview

Thank You & Questions

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