lendfusion

Task	Description	Owner	Status
Map Current Workflows	Document origination, servicing, collections, and reporting processes.	Ops Lead	☐
Audit Existing Tools	List spreadsheets, CRMs, and servicing tools currently in use.	Tech/Ops	☐
Define Success Criteria	Set goals for automation, visibility, and compliance.	Leadership	☐
Select Migration Cohorts	Choose rollout order (e.g. by product, volume, or risk).	PM / Product	☐
Prepare Historical Data	Clean and format borrower records, transactions, and notes.	Data / Compliance	☐
Run Shadow Operations	Mirror live operations for a test cohort in sandbox.	Ops + QA	☐
Train Users by Role	Deliver SOPs and walkthroughs tailored to task owners.	Implementation Lead	☐
Validate Compliance	Confirm audit trails, data accuracy, and continuity.	Compliance Lead	☐
Notify Borrowers (if needed)	Communicate UI or portal changes with clear instructions.	CX / Comms	☐
Go Live & Monitor	Cut over live cohorts, monitor issues, escalate as needed.	PM + Vendor	☐