

Capability Statement

Actualize Consulting, LLC, is a management consulting firm that focuses on business and technology transformation. Founded in 2003, Actualize has offices in Virginia and New York. We leverage our core competencies and differentiators to deliver unparalleled solutions for federal and state government agencies and financial institutions.

SMALL BUSINESS

SINs: 54151S, 541611
Unique ID: JC9NN2CNV4J7
CAGE Code: 4ZH29
Contract No.: 47QTCA20D00F3
Dates: 9/17/2020 to 9/16/2030

CORE COMPETENCIES

Management Consulting

Strategic planning and roadmap development
 Change management and industry-wide adoption solutions
 Counterparty Risk Management
 Research studies and analysis
 Project Management Office

Business and Technology Transformation

Process Optimization
 Emerging technologies consulting
 Innovation
 Intelligent Automation (Low code, RPA)
 Elimination of paper and forms
 Technology refresh
 Software assessment and implementation

Enterprise Information Management

Strategic planning and health checks
 Data governance and compliance
 Data architecture and standards development
 Business Intelligence, reporting, and advanced analytics
 MISMO data standardization and technologies

Information Technology

Technology integration
 Systems implementations
 Systems architecture
 Project/program management (*Agile, SAFE, Hybrid*)

GOVERNMENT & QUASI-GOVERNMENT CLIENTS

HUD (FHA, Ginnie Mae)	Farmer Mac
Securities & Exchange Commission	Freddie Mac
Dept. of Veterans Affairs	Fannie Mae
U.S. Dept. of Agriculture	Federal Home Loan Banks
	Virginia Housing

DIFFERENTIATORS

Housing Finance Experts - Highly skilled consultants and partners known throughout the industry as leaders and experts. Deep expertise in "life-of-loan", secondary mortgage markets, affordable housing, digital mortgage, mortgage data, and financial instruments.

Business Transformation Experts - Proven capabilities to re-engineer and transition processes, data, and technology from legacy and manual to modern and digital. Enhance organizational effectiveness through change management and culture infusion.

Quality Service - Exceptional CPARS and past performance ratings; significant business from repeat customers.

Company Culture - Ranked as top high-performance company.

PAST PERFORMANCE

Developed future-state business transformation strategy for Ginnie Mae including operating model, conceptual architecture, analytics, and technology. Created a roadmap for multi-year implementation.

Supported the creation of rules related to Delegated Authority at USDA. Created pilot and roll out strategy, delivered key metrics for the creation of a lender scorecard. Created a technology roadmap to automate pre-close and post close QC functions. Provided monthly economic reporting and analytics packages.

Developed strategy and plan, as well as implemented an Enterprise Data Management program for a financial institution. This program resulted in creating a data-driven business decisioning culture, improved data quality and governance, scalable architecture, efficient processes, and cost savings.

Developed requirements, data specifications and solutions design, integration specifications, and testing to develop a large-scale government Loan Origination and Underwriting system supporting Rural America. Created communications strategy and training curriculum for external customers.

NAICS CODES

511199	511210	541511	541512
541519	541611	541612	541618
Develop	541690	541990	

