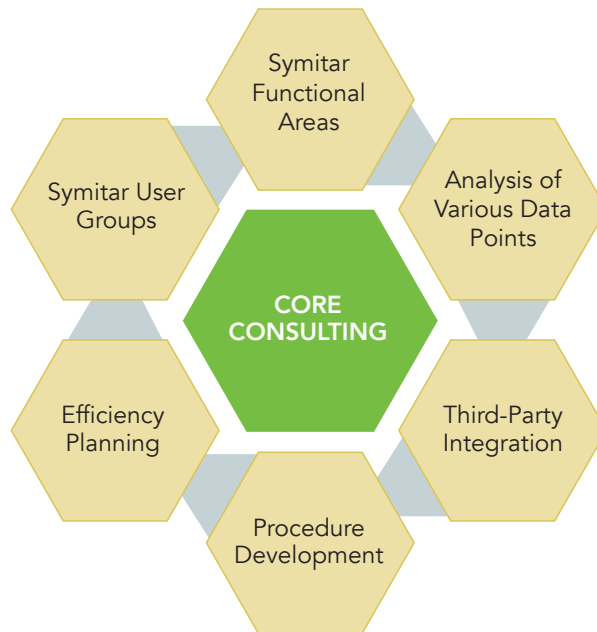




TECHNOLOGY

It is challenging for credit unions to maintain in-house Symitar expertise. Staff turnover, employees wearing many hats, the need for rich (but time-consuming) member interactions, and the ever-changing world of technology all make it difficult for staff to focus on the strategic challenges of growing a credit union.

As an established, trusted partner, Synergent has Symitar subject-matter experts on staff and is your one stop for expertise and guidance. By providing core consulting, our experts can help your credit union grow shares, increase loans, and gain both short- and long-term efficiencies.



Core consulting provides credit unions the opportunity to work with and receive advice from a subject matter expert to maximize their core processing investment.

- Grow shares
- Increase loans
- Strategize operations
- Gain efficiencies

"This was so valuable to our credit union! There are so many enhancements and efficiencies offered throughout the year but it can be hard to keep track of them all. This deep-dive consult allowed us to talk more in-depth about what would be best solutions for our credit union."

- Marti Allen
Casco FCU

TYPES OF CONSULTATIONS

Core consulting is offered to credit unions who partner with Synergent for their Jack Henry™ Symitar® core processing. There are four different types of consultations credit unions can choose from: Efficiency Consult, Targeted Consult, Deep Dive Consult, and New Product Consult.

Efficiency Consult

The Efficiency Consult replaces what once was known as a "System Utilization Review," or "SUR." This review focuses on ensuring the credit union is using all of their existing core products and services as efficiently as possible. It is a free consultation and not a sales opportunity: the Efficiency Consult focuses solely on the existing product set. No additional or new implementations will occur as an outcome. The purpose is to help the credit union make the most of their Symitar core investment and the add-on modules they've purchased.

FOR MORE INFORMATION

800.341.0180

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"We found the consultation to be a valuable exercise. The process was conducted expeditiously, without much additional burden to the already busy schedule. It identified several opportunities to improve various areas, but also confirmed that we are using much of Symitar in the most effective manner. This gives us confidence and helps us focus on the next level of opportunities to improve efficiencies. Overall, this consultation was beneficial to the credit union and a productive use of our time."

- Kelley Carter
Sebasticook Valley FCU

"Synergent's provision of hosted Jack Henry™ Symitar® core processing isn't limited only to the product itself. Our team of experts is here to holistically help credit unions as consultants, a single source for core expertise and recommendations. Our goal is to help credit unions improve performance in operations, management, revenue, and growth strategy."

- Jen Berry
Vice President
Core Conversions & Consulting
Synergent

Targeted Consult

The Targeted Consult is an 8-16 hour system review of a specific focus area, such as collections, lending, application processing, or technology adoption. This may include extra guidance and project management for single product deployments. The process will culminate with an actionable, systematic change that takes place on a "Go Live" date. If more than 16 hours are needed, a determination will be made on if a Deep Dive Consult is needed.

Deep Dive Consult

The Deep Dive Consult is similar to the Targeted Consult in that it is a system review of a specific focus area, such as collections, lending, application processing, or technology adoption. It may include extra guidance and project management for single product deployments. However, the Deep Dive Consult is intended to provide actionable, systematic change with suggestions for the credit union to consider, as well as configuration to extract the greatest value possible for a specific area. It is a more intensive process, typically taking 16+ hours to complete.

New Product Consult

The New Product Consult is led by the Account Relationship Manager and involves assessing and recommending new products for credit unions to adopt to increase year-over-year growth and improve internal and external service. This will help credit unions select products that will provide members with innovative, in-demand products and allow them to learn about, understand, and make strategic investments based on market trends.

KEY BENEFITS

- **Trusted Symitar Expertise:** Work with a familiar subject matter expert to learn, understand, and adopt the latest core features, functionalities, and add-ons.
- **Strategic Credit Union Growth:** Improve performance in operations, management, revenue, and growth strategy. Increase loans and shares while gaining both short- and long-term efficiencies.
- **Reduced Friction:** Identify how to most efficiently use current products and determine which add-ons can best complement the technology stack in place at your credit union.
- **Multiple Consult Areas:** Whether a global Efficiency Consult, a detailed Deep Dive Consult, or otherwise, offering multiple consult areas ensures your credit union gets the right assistance, in the right areas, at the right time.
- **Holistic Approach:** Core consulting takes a 360-view at how the core integrates with existing or new products and services.

LEARN MORE

To learn more about core consulting, or to schedule your consult, please contact your dedicated Account Relationship Manager, or email ARM@synergentcorp.com.

FOR MORE
INFORMATION

800.341.0180

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RIGHT TIME. RIGHT PLACE. RIGHT SOLUTION.