



## TECHNOLOGY



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

Credit unions can gain back some extra time for their teams. As an established, trusted partner, Synergent has core and business continuity subject-matter experts on staff ready to assist you as your one stop for expertise and guidance.

### HOW IT WORKS

Core Consulting is a service offered to any credit union that has the Jack Henry™ Symitar® core processing platform, whether through Synergent or another source. Business Continuity Planning is offered to all credit unions to help them prepare for an emergency should one arise. Together, these services can maximize a credit union's preparedness and help them leverage their core investment to the max.

There are many different types of consultations offered by the Core Consulting team:

**Efficiency Consult** – Formerly known as a System Utilization Review, this reviews add-on modules and ensures credit unions are using all of their existing core products and services as efficiently as possible.

**Targeted Consult** – This is a 15-hour system review of a specific focus area, such as collections lending application processing, or technology adoption.

**Deep Dive Consult** – The Deep Dive Consult is an expanded, more intensive version of the Targeted Consult. It typically takes 25+ hours to complete.

For Business Continuity Planning and Core Consulting, a tailored consultation can be created to meet your unique needs, or you can select a pre-defined consultation:

### General Ledger Evaluation

With a General Ledger (GL) evaluation, together we will review your current chart of accounts, financial statements, GL translation, distribution tables, and batch postings. Using this information, we will provide recommendations for effective reporting. We also review GL account access and accounts payable to gain new efficiencies and to ensure GL postings are clear and precise within each batch job.

Core Consulting is a service that provides credit unions the opportunity to work with a subject matter expert to maximize their use of the Jack Henry™ Symitar® core. Business Continuity Planning helps credit unions prepare for an emergency before one happens. Credit unions can leverage these services together for the most comprehensive strategic planning.

- Maximize core preparedness
- Set plans and strategies in case of an emergency
- Take a holistic approach to crisis planning

*"For credit unions using the Symbitar core, this is a valuable, streamlined offering that helps a credit union prepare for the worst, though we hope that never happens. Being prepared can mitigate an emergent situation and remove challenges before they even start. Our team of experts is ready to assist in helping you plan for an emergency and in leveraging your core capabilities. "*

- **Jen Berry**

Vice President

Synergent Core Conversions  
& Consulting

- **Bill Ashland**

Assistant Vice President

Business Continuity  
Synergent

- Clean up chart of accounts
- Review GLs against translation table
- Review accruals
- Analyze fixed assets and prepaids
- Complete accounts payable efficiency analysis
- Make GL posting recommendations
- Review GL balancing

## Data Permissions and Security Review

Your data is only as secure as your permissions are within your staff and consoles. This Deep Dive Consult will include reviewing your console, user, and security group setup, as well as reviewing field FM controls and process controls when it comes to accessing accounts or functional areas. Your security and file maintenance journals will also be reviewed to provide the best output possible to ease research in file maintenance and security overrides.

- Analyze all permissions at user, group, and console levels
- Recommend field restriction possibilities to ensure fields aren't erroneously changed
- Review print control access permissions
- Discuss restricted permissions within the account records
- Review password settings, override settings, and security report

## Annual Data Cleanup

Data hygiene is an ongoing process to ensure all your data files are accurate and current. While completing ongoing updates as they occur is beneficial, we recommend setting aside dedicated time each year to complete a formal database cleanup. Synergent consulting experts can perform the heavy lifting by analyzing your database, sharing output, and assisting you with a full systematic cleanup.

- Review reports, accounts, postings, vendors, and processes
- Verify account codes and settings
- Cleanup dormant or inaccurate accounts

## KEY BENEFITS

- **Trusted Symbitar and BCP Expertise:** Work with a familiar subject matter expert to learn, understand, and adopt the latest 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 use current products and determine which add-ons can best complement the technology stack in place at your credit union most efficiently.
- **Multiple Consult Areas:** Whether a global Efficiency Consult, a detailed Deep Dive Consult, or focused business continuity planning, offering multiple consult areas ensures your credit union gets the right assistance, in the right areas, at the right time.
- **Holistic Approach:** Synergent consulting takes a 360-view at how core processing and business continuity integrates or complements existing or new products and services. This increases your resilience and reduces risk.

## FOR MORE INFORMATION

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RIGHT TIME. RIGHT PLACE. RIGHT SOLUTION.