

## List of Services

SymAdvisor is a consulting service that understands the unique landscape of your industry and the technical details of your Symitar® products. Its goal is to help you process efficiently, operate holistically, and think strategically. Due to our team's deep industry and Symitar-related experience, we can assist with virtually any objective. Engagements are tailored to fit the unique needs of your organization. A SymAdvisor will always act as your advocate, offering an impartial perspective based on decades of industry experience. You choose among these engagements or tailor one to fit your needs:

### STANDARD EFFICIENCY ENGAGEMENT

A SymAdvisor team member engages your staff to uncover opportunities to use Episys® and the processes that surround it more efficiently. He or she gives practical recommendations (both written and verbal) and offers tactical implementation guidance. The SymAdvisor works with your team before a site visit to determine which areas of your operation are best suited for the review. The review then occurs at your credit union. Your SymAdvisor will provide a detailed analysis after the review.

### FIND AND FIX

A SymAdvisor works with your team to uncover the challenges with a specific process (find) and implement changes (fix) during a very targeted engagement. These are short engagements designed to have discovery, decision, and implementation within the week. Examples include updating the collections package and creating accounts payable workflows. These engagements are most effective when conducted onsite.

### SPECIALTY AREA ENGAGEMENT

Your organization engages with a SymAdvisor for an efficiency engagement that focuses on one or more targeted areas. This targeted approach allows the SymAdvisor to focus on a specific area, providing many more recommendations than a standard efficiency engagement would reveal. Examples include engagements that focus on accounting, lending, IT, or commercial services. The schedule for the week with a specialty area engagement includes the specialty area as well as all areas with upstream and downstream impact on the department.

### PORTFOLIO AND PROJECT MANAGEMENT

Your SymAdvisor serves as an advocate on all your JHA projects, and is aware of the status of each one. The SymAdvisor ensures that your resources are not over-allocated, and provides input on implementation strategies if needed. A SymAdvisor can manage a number of projects in one portfolio or can assist with the implementation and management of one project. This engagement is handled remotely by an experienced project manager on the SymAdvisor team.

### STRATEGIC INSIGHT

A SymAdvisor serves as a sounding board for your IT steering committee or executive team when making the decision whether to buy products or services from a third party or to develop them internally. We will provide feasibility and level-of-effort for each project so you can make sound business decisions. Your SymAdvisor can provide insight into Symitar's technology roadmap and how it aligns with the credit union's strategic vision. This type of an engagement can be provided as part of an onsite Efficiency Review for no additional cost, or can be an onsite or remote individual engagement.

### REVITALIZATION

The SymAdvisor leads your credit union through a multi-year process of improving the system to better meet the needs of your organization. This is an alternative to a short-term Episys Renew, and ideal for organizations with limited resources or limited project management experience. SymAdvisor conducts this engagement with a mix of onsite and remote work.

"The visit went very well and provided lots of valuable insight. Having a SymAdvisor conduct a periodic review is a great idea. It was great learning more about Episys and our plan is to have a SymAdvisor come onsite again in the future as it is also good to continually learn about the core and its capabilities. Having someone come in and help us will greatly facilitate us getting our money's worth out of the system."

- Laurie Antoszewski, PMP, Kitsap Credit Union