

## Software Implementation Support Services

Cync Up provides technology project implementation support for billing, core banking and customer service operating systems. The primary objective of Cync Up's work is to optimize the software in order to achieve operating efficiencies that save financial resources, time resources, and have little to no impact on customer satisfaction and employee engagement.

Replacing core operating systems can be disruptive to any organization. Cync Up provides the experience and financial industry knowledge that decreases this disruption by focusing on the technical issues as well as the change management and communication issues that must be addressed during a system conversion.

Cync Up, led by Cynthia Ruma-Buettner, will help you navigate project scope, schedule and budget through clear communication and an understanding of your organization's requirements. Cynthia will assist you as you make critical decisions during the project while managing scope creep and maintaining budgetary estimates.

Using a value-driven project management process, change management is incorporated into the project implementation. Accountable roles with time-certain deadlines accompanied by regular and consistent communication will lead to a smoother implementation throughout the organization. Monitoring project progress alongside business metrics provides measurement of the efficiencies to be gained through the new software.

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### ***Support services of partnering with Cync Up for your software implementation:***

#### **Pre-Conversion and Planning**

- Support project planning and identification of required project tasks.
  - Data conversion planning and preparation, including data clean-up and mapping.
  - Translate FI's requirements to process changes and software functionality alignment to ensure efficiency gains are captured.
    - Analyze existing systems and business processes in order to guide FI through a seamless transition
    - Support software gap definition and suggesting alternatives
    - Support the writing of development specifications for gap items
  - Assist and support the management of escalation issues.
  - System integrations implementation planning with third-party vendors.
  - Internal resource needs identification.
  - System testing planning and scenario identification support.
  - Employee Training planning support
  - Internal and external communications planning
  - Advise and support the internal project manager to effectively configure internal resources and set internal timelines for project work while maintaining ongoing bank operations.
  - Development of stakeholder reporting mechanisms.



## Conversion and Implementation

Throughout the project there will be key activities and milestones that Cync Up will be able to support as a consultative resource to the Financial Institution's internal teams. These activities/milestones will include:

- Weekly project meetings to review progress toward key milestones, project and business metric measurements.
  - One meeting per month would be on-site as needed and requested by the FI.
- Onsite participation and support during mock conversions (2 planned).
- Participation and support of requirements gathering and documentation of review sessions.
- Participation and support of third-party software integrations and testing.
- Participation and support of process reviews and employee training.
  - Support for writing guides used in User Acceptance Training
- Participation and support of internal and external customer communications.

### Post – Conversion:

Following conversion and through the first month-end processes, the following support services are available:

- Daily post-project meetings to review outstanding issues from go-live. Transitioning to weekly and then monthly as issues are addressed.
- Post-conversion activities are completed as identified in the project plan.
- First month-end support (on-site if necessary)

### Cync Up For Your Next Project

Cync Up provides clients with experienced project management expertise and support. We are not distracted by the day-to-day business operations so we can keep sight of the desired gains originally defined by the software project's objectives. We help clients establish key performance indicators and goals linked to the bottom line while also maintaining a high level of customer satisfaction. We support you in ensuring that your employees understand how to utilize the full functionality of the new system and we can provide support to them with clear training and guidance for a seamless transition.

Experience in the field allows us to recognize potential problems, develop insightful solutions, drive change, and maintain improvement. Cync Up becomes a part of your internal team and is committed to a successful outcome of your project. Please contact us for more information and to discuss your upcoming technology project.