

YOU CAN'T JUST THROW MONEY AT A PROBLEM

Implementations. Our Track Record.

Ask around. SIT has a great track record for helping organizations implement banking systems on time and on budget. Our secret? We've learned that you can't just throw money at a problem. It takes leadership, trust, and commitment—from the vendors *and* the customers. SIT will simply not accept fees for an implementation if we believe a customer isn't ready or committed. We don't need that kind of revenue.

Pulling Together. Execs and OpStaff.

With over twenty years in the business you'd think we'd have all the answers. We don't. Every customer implementation is different. And the biggest success factor isn't the technology, it's the people. Your executives, our executives. Your operational staff, our operational staff. Getting these groups to work together around a believable plan is the primary challenge. The budget, the project plan, and the resource allocation all fall into place if we're working as a team.

Your Vision. Our Solution. A First Draft.

Business goals. Operational requirements. Culture. Budget process. These are some of the factors SIT takes into consideration when drafting a proposed solution for you. Do we want to implement in phases or create a single (larger) solution? When will the go-live date be? We'll work with you to answer these questions and take a first pass at proposing a solution. It won't be perfect. And it will need scrutiny from others we bring into the process. But it's where everything starts. If this part of the process is smooth, it bodes well for a successful implementation.

Implementation Strategy Workshop. Making it Real.

The primary purpose of SIT's Implementation Strategy Workshop is to clarify roles, responsibilities, and ownership—for SIT, your executives, and your operational staff. We need executive sponsors and operational staff from both SIT and your organization to come together as a team to navigate a pathway to success. By the end of an Implementation Strategy Workshop, we've built a complete implementation plan, assigned responsibilities, and created contingencies. It's a great feeling. Will this plan change? Yes. We guarantee a surprise or two. Yet, because we created contingencies these surprises will not jeopardize the overall success.

Project Planning.

All SIT project managers follow the best practices outlined by the Project Management Institute, and operate with a charter that is supported by all senior executives at SIT. As you can imagine, in any banking software conversion or implementation there are hundreds of functional pieces that must be in place to make it all work. SIT's project manager ensures that we document and track these functional pieces of the solution.

Implementation Success



After the Implementation Strategy Workshop, the project manager sets up periodic meetings to track success against the commitments we've made to each other for dates and resources. There will be hurdles. And there may be roadblocks. But these are no surprise for any seasoned project manager. They'll know whether to navigate or escalate.

Training.

Your staff will receive training on the specific Portfolio Plus modules that will be used at your organization. But how well will they retain this information? That's up to you. They'll need time for hands-on practice on the pre-production system that SIT has installed at your organization. This is a critical success factor. Refresher training, before you put your system into production, can also help ensure success.

One SIT customer put their system into production without notifying us. We were surprised—but we were proud, too. It was a testament to our banking software and our training. We admit that most of the credit goes to the customer, however. They were the ones who motivated their staff to spend enough time practicing on a pre-production system to ensure they were comfortable with Portfolio Plus.

**CONVERSIONS
ARE HARD. VENDORS
WHO DISAGREE ARE
INEXPERIENCED OR LYING.**

Conversions.

Anyone who says banking system conversions are easy have outed themselves as being inexperienced or having questionable integrity. SIT has seen some competitors spend years trying to accomplish conversions and then run millions over budget. At SIT we like to admit that it will be painful from the start. Our track record suggests this is the correct approach.



Implementation Success



At a high level there are two major processes involved in a banking system conversion. First, your staff (and ours) must go through an exercise of mapping your current set of products to those that will be managed on Portfolio Plus. Creating the products on Portfolio Plus is the easy part. Ensuring you've captured every nuance of your existing product is often the biggest (and most surprising) challenge. Once the product mapping is complete, SIT can begin the second major process—transforming your data so it will be compatible with Portfolio Plus. SIT works with you through multiple conversion iterations to ensure we've transformed the data correctly.

Technology Platform Requirements. We Can Help.

At SIT we find that each customer has a different degree of technology sophistication. Some customers maintain their own technology platform, believing this is part of their core competence, while other customers outsource everything. Some customers rely heavily on SIT for more complex technology processes, while other customers have dedicated staff to do this. At SIT we can work with any degree of technology sophistication. The important thing for SIT is to help you ensure your platform has operational integrity and that you're prepared for disasters. Let us know if you'd like to discuss the expert services that are available to you.

Business Validation.

As your "go live" date approaches, your staff should become increasingly confident with the day to day processes that will be handled on Portfolio Plus. Make it easier for them. Ask SIT to come to your premises to sit next to your staff while they are conducting their hands-on practice sessions. These sessions will validate all the preparatory work that has gone before and is the final step that will uncover any final adjustments that might need to be made to ensure a smooth "go live".

On Site Support and "Go Live".

SIT prefers to have a staff member at your location when your Portfolio Plus system goes into production. It's better for you. And it's better for us.



Implementation Success



In Production.

Once your site is in production, it is important that we establish a single line of communication for any issues (training or process related) that arise. SIT assigns a single channel of communication that can provide you with support as required. Also, please remember that you have 24 hour coverage for any issue that prevents the system from being used in production.

Account Representative.

Every customer of SIT is assigned an account representative. Your account representative can help you with more strategic issues and any financial arrangements. They can also help champion any features you'd like to see in future versions of Portfolio Plus.

SIT Advantage.

As an SIT customer you also have access to SIT Advantage, which is a website reserved exclusively for SIT customers. It has the latest regulatory communication updates, service packs for supported releases of Portfolio Plus, a knowledge base, and more.

Portfolio Plus User Group.

SIT plays a key administrative role in the Portfolio Plus user group. If you'd like to be added to future notifications, please request to be added to the Portfolio Plus User Group on LinkedIn. This will enable you to receive future updates and notifications.