

# Professional Services

Strategic guidance and leadership experience for your conversion project. It's an opportunity to deliver a great customer experience together.

Digital Insight's Professional Services organization includes a team of seasoned program managers, project managers, technical engineers and data administrators with experience in overseeing complex conversion projects, such as:

- Online Banking platform conversions.
- Financial institution mergers.
- Core processor conversions.
- Custom app development.

*"From the very first call, our program manager engaged our team, not as third-party vendor, but as a true partner to ensure our success."*

— Online Banking platform conversion

## Benefits



**Strategic Partner and Advocate** – We provide the support and expertise to help you achieve your vision of program success. Our professional guidance will give you confidence every step of the way.



**Focused Project Leadership** – You'll have one point of contact for your conversion, driving Digital Insight project teams and specialists cross-functionally to get results.



**Expert Guidance** – We offer insights and expertise to support you as you make decisions that affect your project and help you deliver a great customer experience.



**Strong Collaboration** – We make a commitment to teamwork, with on-site support available for your project kickoff and go-live dates.



**Trusted Project Approach** – We will create a conversion process that's tailored to suit your project and business needs, with guidance for:

- Planning and analysis.
- Implementation and testing.
- Staff and customer readiness.
- Go-live event.

*"Our Professional Services program manager brings a nice balance of technical and business understanding. He definitely stands out as someone who delivers results!"*

— Core processor conversion

## Tools for Success



**Strategic Project Assessment** – Gain insights to guide your project, including a business needs study, a product and interface solution analysis and a user-experience review.



**Results-Driven Program Management** – Measure success with professional project tracking and reporting, including a custom project plan, weekly team meetings, executive sponsor check-ins and risk-mitigation plans.



**Actionable Best Practices** – Receive practical guidance based on years of conversion experience, peer financial institution learning and deep industry insights.



**Customizable Tools for Staff and Customer-Readiness** – Leverage marketing timelines, ready-to-use communication templates, staff training plans and support resources for a successful launch.

*“It’s great to work with a vendor who cares about the process and does not leave things to chance. For the next project we have with Digital Insight, you can bet we’ll rely on Professional Services again.”*

– Financial institution merger

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Banks and credit unions turn to Digital Insight for innovative online and mobile banking technologies that drive growth. For nearly 20 years, our leading solutions have helped financial institutions engage consumers more meaningfully and more profitably.

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