JHA Treasury Management™

Consulting Services

Whether you're new to Treasury Management or a long-standing customer, we're honored that you've chosen us. We're committed to ensuring Treasury Management is a great strategic decision for your financial institution – and that it stays that way. To help you get started on the right foot (and stay on it!), Jack Henry offers in-house consulting engagements designed specifically for working through multiple phases, such as platform adoption, preparing for a product launch, or simply bridging knowledge gaps.

We offer two engagement types as a starting point, both of which can be customized for your unique situation:

Focused Learning Engagement

New to Treasury Management? Our Focused Learning Engagement is designed to ensure your financial institution establishes a strong foundation by addressing your platform adoption goals and catered-to-you objectives.

Micro Engagement Model

What if you're a financial institution already familiar with Treasury Management or preparing to launch a new feature? The Micro Engagement Model closes knowledge gaps and addresses your evolving needs by specifically targeting your most essential goals within one single session.

Engagement Option #1

focused learning engagement

Whether you're a new or existing SilverLake client preparing to adopt the Treasury Management platform, this is the perfect engagement for you. From training and communication, to onboarding and support, we cover all the big topics.

We know that every financial institution is unique. That's why our schedule is highly customizable – in both session content and meeting frequency – so we can work through your primary concerns at the pace that makes sense for you and your team. Whether you need general guidance or have specific questions and use cases, we can design a program that helps you accomplish your goals.

How does the Focused Learning Engagement play out?

We propose recommendations based on our years of experience, but think of these engagements as a partnership – we take guidance from you on how we design the content and areas of emphasis to make sure it serves you well.

The program duration is six to eight sessions and approximately 12 hours total. Want to do all eight sessions in the same week? Can do. Need to work around an already packed schedule and space out the meeting frequency? That's fine too. A typical engagement will include two sessions per day within a one week period.

We approach our Focused Learning Engagements in three phases:

1. **Customized Planning**

   We kick off our engagements by interviewing you to get a full picture of your team, customer base, how you envision using the Treasury Management platform, and any perceived obstacles. From there we propose focused areas of study for our engagement – with you making the final decisions on the topics we cover.

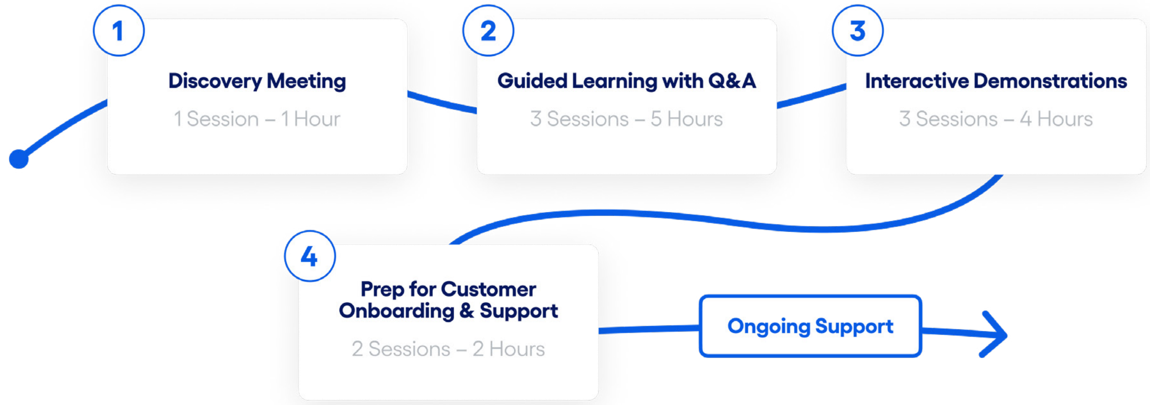
2. **Collaborative Exploration**

   With our roadmap drawn out, we dive deep into each specific topic, providing specialized guides and recording each session. All of these resources are yours to keep – maybe they even become part of your new employee onboarding curriculum.

3. **Clarifying Questions**

   We always make sure to leave time for Q&A, both during and after each session, ensuring that there are no lingering questions or missed points when we wrap up.

An example engagement might look something like this:



We'll Leave You Prepared

Whether you're planning a full-scale conversion from your current platform or a slower paced rollout, we make sure you feel prepared by the end of our engagement. We even provide our best tips and tricks to equip your team as they gear up to support customers through the transition. If you do run into any complex challenges, our Treasury Management support team is here to help.

Engagement Option #2

Micro Engagement Model

If you're a financial institution familiar with Treasury Management and you're looking for extra coaching on a topic or guidance on a potential new feature offering, this model is for you. Instead of reinventing the wheel and focusing on all the major functional areas of Treasury Management, the Micro Engagement Model focuses on your most critical needs. Essentially, this engagement is a scaled-down version of the focused Learning Model, designed as a single "workshop" session where financial institutions can learn about a specific topic. The goal is to save you time and resources, honing in on what's *truly* top of mind.

What could this look like?

Let's say you're looking at a new feature offering – with the Micro Engagement Model, nearly every topic is on the table. Here's an idea: You've never offered ACH positive pay with filter management and need to learn how it works, how to sell it, and how to support it. We'll get you prepared. Or maybe you're anxious about fraud and want to ensure you're making the most out of TM's security and authentication options. We'll ensure all your bases are covered.

How does the Micro Engagement Model play out?

With the Micro Engagement Model, you're in control of your learning focus. Leaning into your challenge area, our team designs a coaching engagement catered specifically to fulfill your needs. From here, we gain your input, refine an agenda, and get you scheduled on our books!

One of the best parts? You can include as many attendees as you'd like. Looking to strategically align a group of team members for a new feature? No worries – we'll guide everyone in a single, three hour virtual session.

Never Stop Growing

We know growth can be constant for financial institutions, but navigating those changes is tricky. With the Micro Learning Engagement, you'll be free to focus less on obstacles and more on contributing your time where it's needed. Never stop growing with continuous opportunities to schedule a new engagement any time you're looking to expand into new features or simply looking for a trusted perspective as your needs evolve.

Testimonials

don't just take our word for it

Here's what we've heard from the financial institutions we've worked with in the past:

"Thanks for the great training experience and your willingness to be so flexible with our schedule!"

Orrstown Bank
Pennsylvania

"These sessions were highly valuable to our Team in gaining a full appreciation of the Treasury Management System."

Univest Bank
Pennsylvania

Ready, set, go!

how do we get started?

Once you say “let’s do this!”, we’ll get the ball rolling by having you complete a product survey that helps us understand where you’re at today – including your current customer base, payment volumes, baseline product offerings and more. After that, we’ll have a kickoff meeting to talk through all the details of your current business processes in depth. From there, we’ll outline a unique engagement plan for your financial institution, which you’ll have a chance to review and approve before we move forward. After we’re all on the same page it’ll be time to dig into Treasury Management with your consulting team.

providing guidance every step of the way

Let's talk about this together. treasuryinfo@jackhenry.com

For more information about Jack Henry, visit jackhenry.com.

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