

evaluate provider reliability, security and support

Vendor and reference calls reveal more than capabilities – they provide insight into how working together will feel. For community and regional financial institutions, these insights are critical because the right relationship can transcend operations and become a strategic advantage that drives competitiveness.



five signals to look for when evaluating a tech provider



1. Responsiveness and Support

- Prompt Replies:** Do you get timely answers to inquiries during selection?
- 24/7 Access:** Will you be able to call someone anytime you need help?
- Proven Reliability:** Do they deliver high uptime and minimize disruptions?
- Reduce Complexity:** Do they streamline agreements and contracts?

2. Communication and Transparency

- Open Exchange:** Are they known for clear, transparent communication and continuous improvement?
- Accessible Knowledge:** Do they provide proactive notifications and self-service tools?
- Uniting Peers:** Do they enable communication with reference financial institutions?
- Client Connections:** Do they create opportunities for learning, growth, and networking?

3. Collaboration and Flexibility

- Tailored Solutions:** Do they enable customization through modernization, integration, and third-party connections?
- Act on Feedback:** Do they actively seek input and follow up with personal calls?
- Guidance That Matters:** Do they share industry insights to help solve critical challenges?

4. Strategy and Innovation

- Company Culture:** Do they consistently deliver exceptional client support and results with integrity?
- Open Access:** Can you connect with people at every level, including senior leaders?
- Future-Focus:** Do they post six-month roadmaps that show how they will modernize solutions?
- Accelerate Growth:** Are they leveraging the public cloud, AI and ML, and open APIs to help you scale and stay ahead?

5. Reliability and Trustworthiness

- Goal Alignment:** Are they aligned with your business objectives and committed to helping you achieve them?
- Client-First Focus:** Can they verify they maintain a high satisfaction rating with clients?
- On-Time Delivery:** Do they reliably deliver on what they commit to – including the service levels you agree on?
- Security and Compliance:** Do they understand your regulatory needs and prioritize robust security and ethical practices?



unlock your growth potential with stronger technology relationships

Uncover how a strong tech provider relationship can [accelerate your growth](#) or visit the [Relationships Matter web page](#).

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