

SymAdvisor™ Staff Augmentation



4/19/23



- housekeeping

Housekeeping

- Your lines will be muted, but participation is welcome!
- Please use the Q&A tab to enter any questions, and we'll take time to answer questions at the end of the presentation
- You will receive the presentation recording and slides via email following the event

Agenda

Introduction

SymAdvisor Staff Augmentation Overview

Panel Discussion

Closing / Q&A

**Meet our Credit
Union**

- **meet our credit union panelist**

Mark Cordes

VP of Project Management

- Employed with CoastHills for 6 years
- Led collections team and AVP of Consumer Lending
- CoastHills has been with Jack Henry since 1991



**Meet our
SymAdvisors**

- **meet our SymAdvisor panelists**



Erica Switalski

20 years in CU/Symitar industry

11 years in Symitar Prof. Services
leadership roles

6 months at Jack Henry

Favorite activities is working out,
reading and crafting

eswitalski@jackhenry.com



Heather Aukofer

25 years in CU industry

9 years at Jack Henry

Favorite activities include
camping, hiking and crafting

haukofer@jackhenry.com



Sharon Lynde

25 years in CU industry

5 years at Jack Henry

Favorite activities include hiking,
playing with grandkids and road
trips

slynde@jackhenry.com

Staff Augmentation Services TM

No Resource? No Problem. Staff Augmentation Options

Symitar SME

System Administration

IT Operations

IT Management

Technical Project
Management

Business Analyst

Technical Project Management

Project Management meets Business Consultant



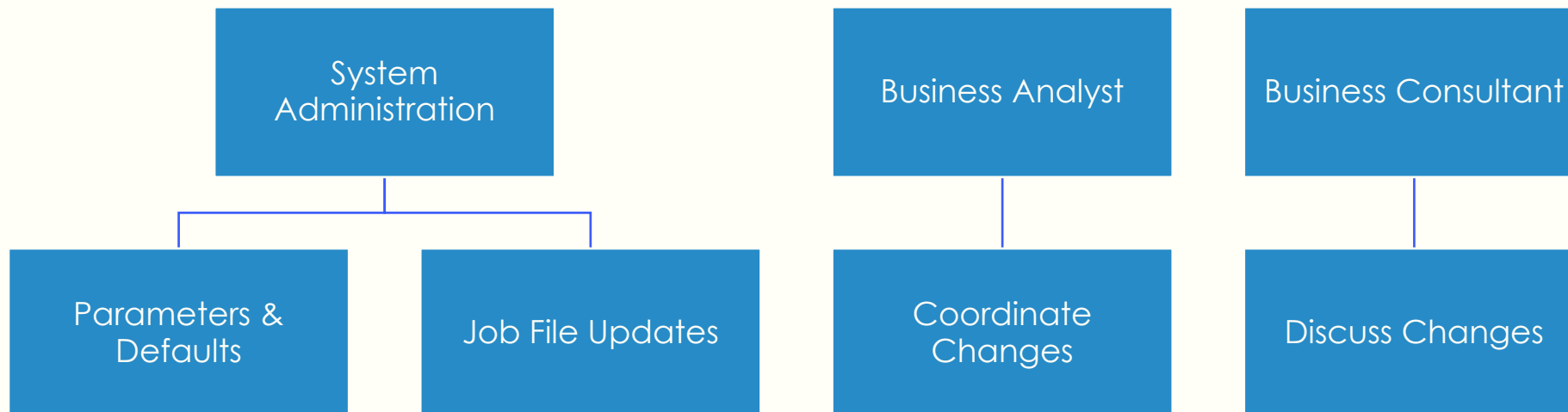
Project and portfolio
management on your behalf

Best practice consulting for each
project within the portfolio

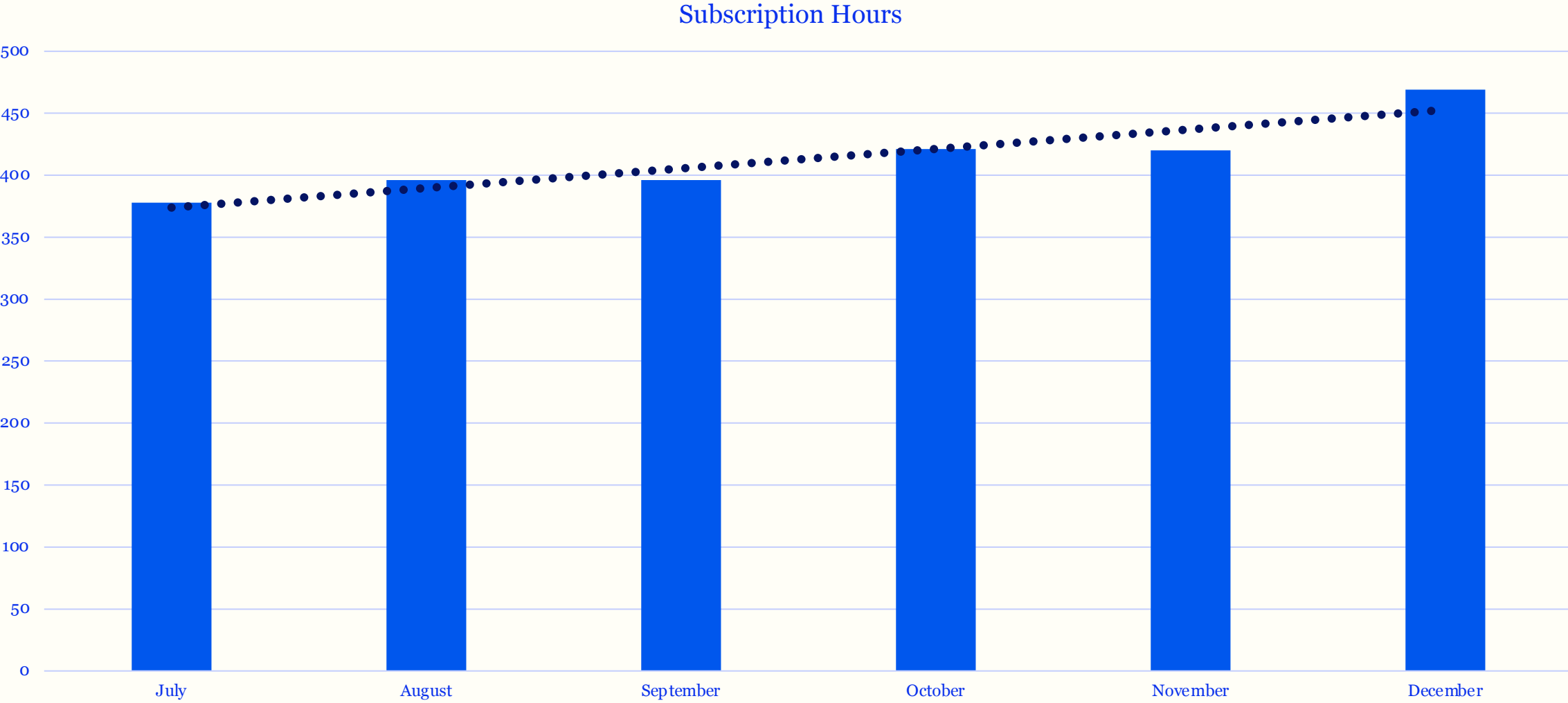
Analyst, implementation, and
operational assistance as
needed with each project

An extension of
your team

IT Operations Staff Augmentation



• growth projection



Panel Discussion

- panel discussion

Tell us a little bit about the problem(s) your credit union was facing, and why you decided to engage with the SymAdvisor team?

- panel discussion

**How did the SymAdvisor
team structure an
engagement to overcome
those issues?**

- panel discussion

How were you able to get “buy in” from other CU stakeholders or explain to your higher decision makers that you needed to partner with the SymAdvisor team?

- panel discussion

What do you feel is the biggest or most unexpected benefit that you have received from working with a SymAdvisor?

- panel discussion

What do you feel is the biggest or most unexpected benefit that you have given to your partner credit union?

- panel discussion

What are some quick wins or items that didn't take a lot of time to implement?

- panel discussion

What are some additional “engagements” that you were able to conduct during your subscription engagement?

- panel discussion

**How do you feel about your
SymAdvisor's experience and
ability to help your credit union
meet it's goals?**

- panel discussion

**What advice do you have for a
credit union considering
partnering with a SymAdvisor?
Maybe something you wish
you had known?**

Questions?