

**Get More Value
Out of Your Technology
and Resource Investments**





Along with world-class technology solutions, Open Solutions® offers a wide range of services to help your organization improve the return on your technology investment, as well as maintain and leverage a competitive advantage in today's marketplace. Our Professional Services Team combines industry expertise in business and technology services with deep product knowledge to help our clients improve performance.

Our resources and capabilities can help you:

- Improve processes and expand products using our technology solutions
- Evaluate and improve your institution's security processes
- Implement cost-saving measures and take advantage of revenue growth opportunities
- Leverage profitability and performance data, market analytics and financial analysis to develop sustainable business improvements with measurable results
- Optimize the use of relationship management and business intelligence services
- Provide product education to ensure maximum productivity of your staff

Whether you are converting to Open Solutions products for the first time or have been with us for years, our Professional Services organization can guide you to the next level of optimization.

Benefits of Open Solutions Professional Services

Open Solutions Professional Services gives you access to a group of consultants with unparalleled, in-depth technical knowledge of our products, a complete understanding of your business environment, and a comprehensive grasp of industry best practices.

Use our consultants' skills and knowledge to discover and implement technology solutions that make sense within the context of your business. To complement our consultants' practical expertise, we offer a team of Strategic Advisors who can help you transform your business by developing and executing strategies that result in meaningful, profitable growth.

Open Solutions Professional Services are specifically geared to the financial services community – its culture, its regulatory environment and its best practices. That means you get world-class business and technology solutions from professionals who understand your business and can anticipate your needs as business conditions change.

Technology Optimization Services

Pre-Conversion Best Practices. Our team will conduct an enterprise-wide evaluation of your existing business processes and organization, identifying opportunities for improvement and ensure alignment with technology capabilities early in the conversion process. Rather than implementing new technology on top of business processes that have evolved around legacy technology solutions, we help clients drive efficiency, reduce rework, eliminate unnecessary paper flow and improve service levels.

Relationship Management Services. Best-practice assessments analyze your CRM and Business Intelligence environment and processes, providing recommendations to achieve the most out of your Customer Relationship Management technology investment. Our team examines opportunities in the areas of marketing analytics, campaigns management, business development, sales tracking, referral generation, customer treatment programs, service level agreements, contact management and other relationship management processes.

Operational Reviews / Process Alignment. To streamline your operations and improve productivity, our team will show you how you can use our technology to reduce or eliminate unnecessary manual activities, improve quality and reduce errors, and modify front- and back-office staffing based on industry benchmarks. Our recommendations include redesigning business processes, defining target staffing levels, and identifying opportunities to centralize or decentralize processes to achieve productivity and service level improvements.

Platform and Infrastructure Services. Our team can conduct database performance evaluations, assist with database maintenance, disaster recovery planning and testing, and execute preliminary tasks necessary for release upgrades, testing or configuration. Our services offer a cost-effective alternative to maintaining on-site technical personnel for periodic Oracle support and maintenance functions. We can also provide additional manpower to help your existing technical staff complete database-related projects.

Security and Authorization Reviews. Our team will work with you to define and implement DNA security and authorizations for each function within your organization, ensuring that access to customer and employee data is tightly controlled and that each user has access only to data and transactions necessary to execute his or her responsibilities. We also review security requirements and conduct design workshops with your management and staff, ensuring that your organization understands the advanced capabilities of DNA security and authorizations.

Custom Solutions. Review Open Solutions developed, customized technology solutions available through the world's first core related application store – DNAAppstore™. These revenue-generating and efficiency-gaining custom applications can be downloaded to your test environment in a "try before you buy" program. Don't see what you are looking for? Our team can identify and develop solutions and services directly to your specifications. Or, we can simply augment your staff with implementation assistance, training and other support.

Business Optimization Services

Business optimization services are offered through Raddon Financial Group (RFG). This separately run business unit of Open Solutions arms financial industry decision-makers with objective data gained through innovative research techniques and unique database resources. Offering far more than data, RFG provides strategic guidance and tactical solutions to meet the challenges of the continually changing financial services industry.

Revenue Enhancement. Identify and quantify opportunities to increase non-interest and other fee income that you may not be capturing, and generate additional top-line revenue. Our phased approach establishes a framework that is consistent with your organization's strategy, corporate culture and customer profile, while responsive to the local competitive environment. Our roadmap and hands-on implementation support generate increased levels of bottom line earnings. Your success is defined by measured improvement to your bottom line.

Strategic Planning. Facilitate your organization's strategic planning by adding a unique blend of objectivity, market intelligence and industry expertise. We will lead you through a market-driven, customer-centric planning process designed to drive consensus, commitment and ownership, with factually-based, realistic and achievable strategies and tactics. Our strategic planning process includes off-site analysis, on-site interviews, group participation and finally, plan adoption support.

Merger and Acquisition Analysis. Our phased approach includes a pre-merger strategy, target and market analysis, and post-merger integration. Our methodology incorporates profitability and performance data, market analytics and financial analyses to develop and execute a well-conceived merger.

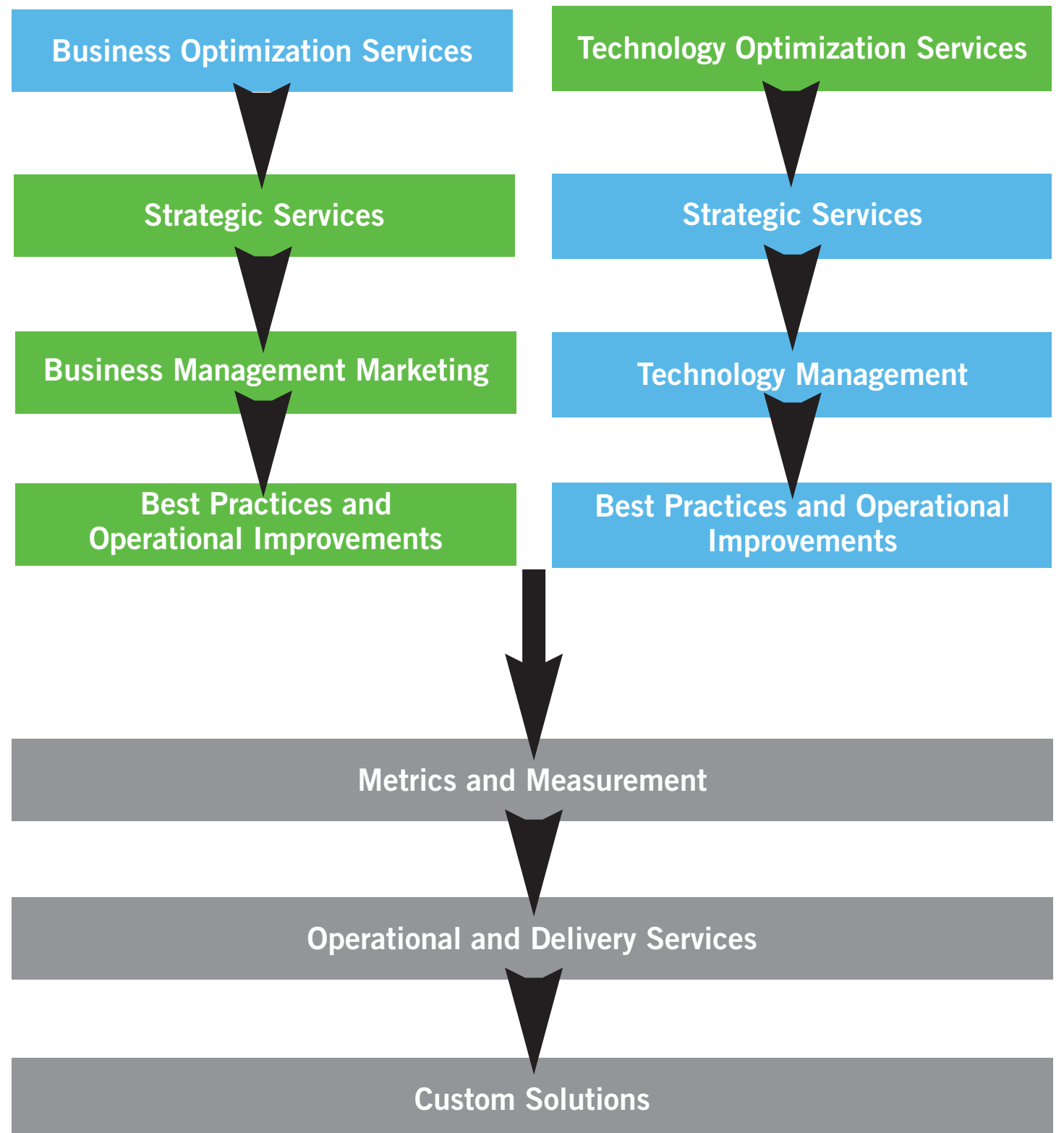
Sales Training. Create a sales and service culture by allowing our team to train your staff to uncover customer needs, and design an incentive plan that supports the desirable sales behaviors while maintaining alignment with organizational goals.

Product Design and Pricing. An in-depth product portfolio review will identify opportunities for new products and pricing options that can lower cost of funds, increase margin, and drive value to you and your customers.

Branch and Market Analysis. Our highly experienced team can evaluate your branch network, identify new, profitable branch and ATM locations, and set market appropriate goals for growth and long-term success.

Growth and Retention Strategies. We offer guidance for successful organic growth through targeted marketing strategies, customer retention efforts, and onboarding and re-boarding programs.

Professional Services Consulting



Open Solutions Inc.® is dedicated to helping community-based financial institutions succeed. Innovators of open, relationship-centered core banking, Open Solutions DNA™ drives collaboration amongst banks, credit unions and other financial services firms around the globe.

Open Solutions strengthens its client community by providing: industry insights and guidance; a highly visible advocacy program for community financial institutions; and leading technology solutions that enable our clients to improve productivity, increase revenue and most importantly, strengthen relationships.



There's Power in Community

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