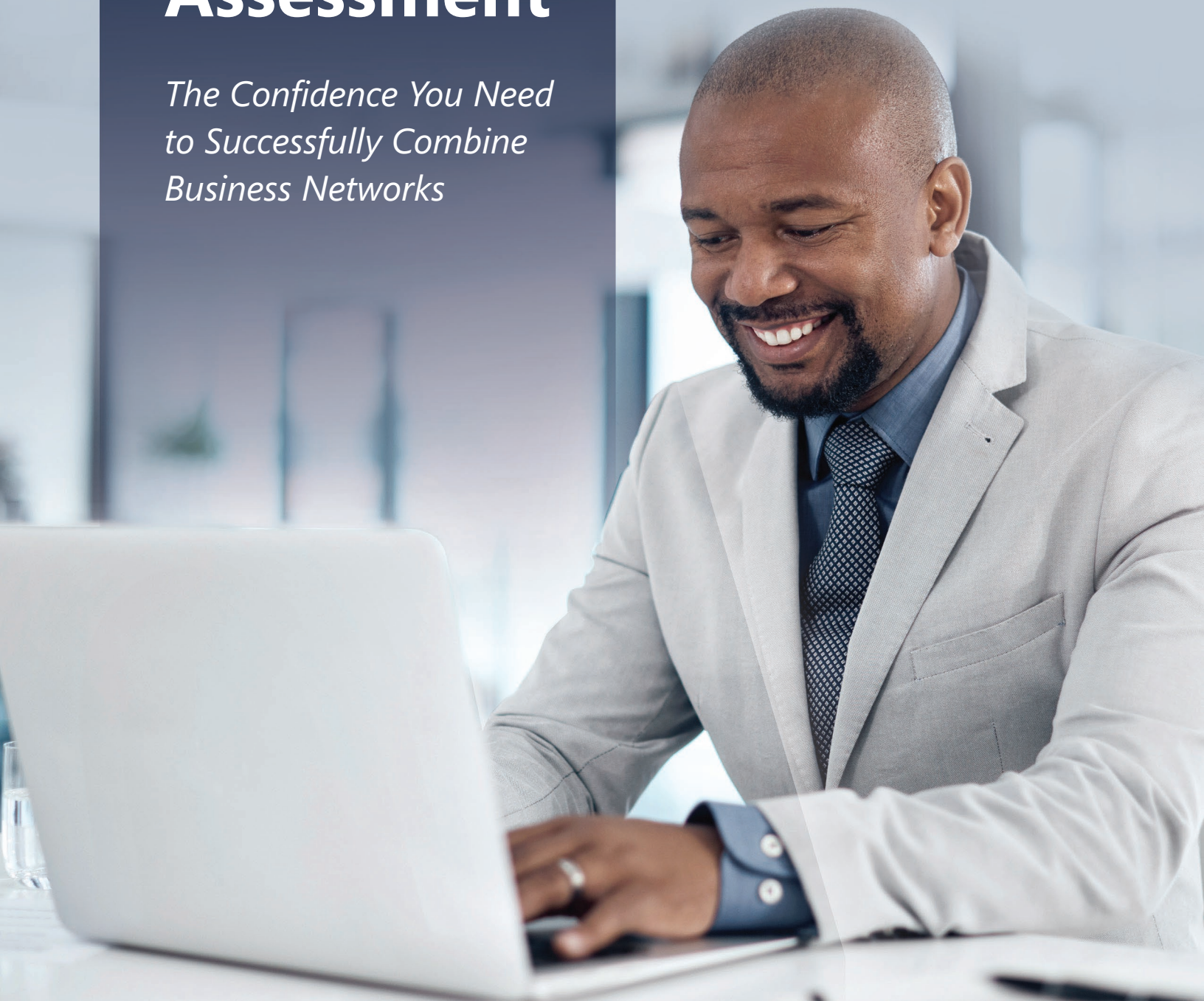


AdvantageCIO

Merger Technology Planning Assessment

*The Confidence You Need
to Successfully Combine
Business Networks*



ACIO Merger Technology Planning Assessment

Credit union mergers are complicated. There are myriad considerations for executives to navigate including core decisions, account base configurations, plastics approaches, which branches will survive, and staffing considerations. Not the least of which are technology decisions you will need to make to get your network combined with another credit union's and executing business transactions every day without fail:

What technology is in play at the other credit union?

- ✓ Can any of it be reused or disposed of?
- ✓ Where in the life-cycle is their technology? How soon will you need to reinvest and are you inheriting any big headaches?
- ✓ How can you optimize communications strategies to save money?
- ✓ Where in the communications contract life-cycle is the other credit union? Are you inheriting high communications costs or long contracts?
- ✓ How are their remote employees connecting to the network? Is it secure? Is it compatible with how your credit union does remote access? Can they be combined?



Get Insight Fast!

The AdvantageCIO Merger Technology Planning Assessment answers these questions and more. It is designed to provide clarity to the credit union executive regarding their merger technology planning and will outline recommendations for a smooth merger process.

We will review existing network configurations at both credit unions, inventory equipment and communications, identify areas for optimization, and provide a road map for successful and cost effective use of technology to help make the merger a success.

The Merger Technology Planning Assessment

Includes a review of everything you need to consider when merging two networks:

Network Architecture

- i. Automated network and software inventory (scanning appliance attached to each credit union's network)
- ii. Review of existing network topology information
- iii. WiFi review
- iv. Provide AdvantageCIO generated combined network topology diagram
- v. Hardware life cycle review and inventory
- vi. Review of IT vendor supplied equipment capacity reports, if any
- vii. Review data communications infrastructure and monthly spend (you will need to provide Telephone company invoicing)
- viii. Remote worker connectivity review

Systems Architecture

- i. Review Windows network and domain infrastructure
- ii. Review and document file and print sharing configuration
- iii. Review data backup and storage configurations
- iv. Review monitoring and alerting systems
- v. Review email configuration

AdvantageCIO are Credit Union and Technology Experts

For the past ten years, AdvantageCIO consultants have provided consulting expertise targeted at the credit union vertical. We understand the pressures executives face with compliance, planning, risk assessments, and technology management. Through our suite of services, we help executives successfully navigate this highly regulated landscape while saving money.

AdvantageCIO offers consulting services in the following disciplines:

- ✔ Strategic Technology Plan – Ensure your technology and business plans are in alignment, and your tech investments make sense and work as hard for your members as you do
- ✔ Technology Risk Assessments – Understand risks to your business and leverage controls you already own to help mitigate them
- ✔ Technology Assessment – Understand your technology, how it is configured, and how to optimize it to maximize its effectiveness, reliability, and security for your network and data
- ✔ Compliance – Turnkey comprehensive information security program that meets all GLBA requirements
- ✔ Board Cyber Reporting – Turnkey annual board cyber reporting program
- ✔ Staff Cyber Education and Testing – Meet annual staff cybersecurity training requirements and ensure they are well tested and ready to meet the dynamic landscape of phishing and spam head-on
- ✔ ACET Response – Completed ACET forms and supporting documentation
- ✔ Merger Technology Planning Assessment – Be confident a merged network will carry your business plans forward and not hold you or your members back
- ✔ Business Continuity – Full disaster recovery plans and business impact analysis gives you the confidence to face uncertain times



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