

Conversion Services

Customized Strategic Advisory Services
for Future-Ready Financial Institutions

Technology conversions are complex and having the right guidance is essential. With our team-centered approach, we educate and empower your financial institution for long-term success.

Our conversion projects cover a wide range of technology initiatives, including core systems, digital banking, payment processors, telecommunications, mergers and more.

How We Help

We ensure your bank or credit union operates at its highest level throughout the conversion and beyond, employing our established methodology, proven process, streamlined workflows, and use of innovative technology. No two conversions are the same, requiring a tailor-made strategy for each client we serve.



Our Process

A Strategic Consultant is assigned to guide you through your project. We also assign an Executive Sponsor to ensure the proper resources are available for expedient resolution to mitigation plans and to serve as a point of escalation. Additionally, we will pull in subject-matter experts from across our organization to assist throughout the engagement.

Engage

Here, we jumpstart our journey and set the stage for success, beginning with building an appropriate project team structure, designing a resource allocation framework, developing a project plan and milestone timeline, creating a data mapping and cleanup strategy, establishing a project team communication plan, and devising a risk management and escalation strategy.

Design

Now we lay the foundation of a successful project, emphasizing change management, external communication guidelines, and contact center support planning – ensuring you receive the full support and readiness needed for the tasks to come. We work with your training department to establish a custom curriculum that includes reinforcement exercises and avoids *usability* as a potential issue.

Test

Subsequently, through user acceptance testing and data validation, we ensure your team is thoroughly trained and confidently at ease with your new system. This includes testing all third-party integration points and systems.

Execute

Finally, we complete a mock conversion and readiness assessment before going live. Post-conversion support is available after your new system is up and running.

Why We Are Different

Our personalized approach is tailored to your financial institution's specific needs and goals. Education is the basis of our approach, and we strive to ensure our clients are in the best possible position to make informed decisions, both now and in the future.

Our people make us different. Every member of the Engage fi team has been hand-selected for their profound domain expertise and extensive industry experience. Coupling domain experience with industry expertise, our consultants come from either the vendor side of the industry, where they know the inner workings of negotiations, systems, and processes, or from credit unions and banks where they have walked in your shoes, can understand your needs, and will empathize with your current state.