

## Improving Operational Efficiencies and Productivity

Nine Things You Can do Now

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### Operational Realities

- Challenges of Operations Work
- Increasing Complexity
- Demands from Internal and External Customers
- CyberSecurity Pressing Concerns
- High Availability System Demands



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### Integration

- Identify all Duplicate Entry
- Migrate to Systems Internal to the Core
- Automation Supports Efficiency and Growth



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**Fight to Improve Utilization**

- Training Levels not Maintained
- Vendors Enhance and Expand Products
- Employees Seek Alternate Solutions



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**Identify Crutches and Band Aids**

- Evaluate Daily Work Practices
- Look for Spreadsheets
- Look for other Manual Processes



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**Avoid Creating Exceptions**

- Allow Software to Make Basic Decisions
- Codify Normal Customer Activity
- Create Alerts only for Out of Band Conditions
- Well Defined Processes can be Outsourced



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### Focus on Automating Workflow

- Strive to Eliminate Paper
- Include Imaging in Your Processes “workflow”
- Electronic Signatures
- Electronic Disclosures
- Electronic Statements



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### Managing the Virtual Branch

- Acknowledge Importance
- Centralize Customer Contact Across all Channels
- Address After Hours Support
- Solution Oriented



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### System Integrity and Reliability

- Power Supplies and UPS
- Simplify and Control Desktop
- Automate Management of BYOD



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### Management Practices

- Establish Expectations
- Manage Daily
- Lather, Rinse, Repeat



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### Cost Control Examples

- Check Clearing Costs
- EFT Costs and Opportunities
- Address Contractual Issues
  - Billing
  - Terms and Conditions
- Measure and Monitor



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Thank You!

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