






## A Blueprint for nCino-enabled Treasury Transformation




### SIGNS YOU MAY BE READY FOR NCINO TREASURY

 Sales	 Onboarding	 Fulfillment	 Servicing	 Leadership
<ul style="list-style-type: none"> <li>• I never know where in the process my clients' requests are</li> <li>• There is so much duplicate data entry across forms, pipeline reporting, and pro forma creation</li> </ul>	<ul style="list-style-type: none"> <li>• I never get requests in the same format and am juggling email requests from different people</li> <li>• I am always missing key information</li> <li>• It is hard to balance workload</li> </ul>	<ul style="list-style-type: none"> <li>• Printing paper forms for compliance purposes takes so long</li> <li>• It is very difficult to predict upcoming volumes of work</li> </ul>	<ul style="list-style-type: none"> <li>• There is no way for me to track my call volumes</li> <li>• It is unclear who I am supposed to route certain issues to</li> </ul>	<ul style="list-style-type: none"> <li>• It is difficult to gather information on product profitability, exception pricing, or revenue leakage</li> <li>• I don't know how my teams are performing or if we are meeting SLAs</li> <li>• I want to further leverage the Salesforce tools we use in other areas of the bank</li> </ul>

### Securing project approval

**Creating a business case:** Quantifying the benefits and cost of nCino for treasury

Quantifying benefits against the cost of nCino helps make the case for nCino-enabled treasury transformation. Deloitte has helped clients to reimagine the treasury business and develop formal business cases with detailed cost/benefit analyses.

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- Faster realization of fees due to reduced onboarding time
  - Reduced revenue leakage from unbilled services
  - Ability to scale up volume without adding staff
  - Time saved on rework, back-and-forth communication, reporting, and quality assurance
  - Increased revenue as sales teams spend more time selling and less time on administrative tasks

**Direct benefits realized in treasury:** Outcomes of nCino Treasury at other institutions

**27%**

#### Reduction in SLAs

To realize fees faster and deliver a best-in-class treasury experience

**50%**

#### Reduction in manual forms

To focus time on solving the toughest problems for customers

## Mobilizing for transformation

**Preparing stakeholders and materials:** Mobilizing for a successful treasury transformation

Treasury transformation is a journey, but mobilization across people, process, and technology dimensions can help set the tone for true transformation.



### Documentation

Gather and evaluate existing process documentation against current processes, including roles, handoffs, and pain points



### Stakeholders

Allocate subject-matter experts from each function of treasury to the core project team, and ensure they are empowered to make decisions for the program



### Process efficiency

Define a target-state vision that allows for process redesign to avoid automation of inefficient legacy processes during the nCino implementation



### Data quality

Evaluate source system data to understand where different data sources reside, as well as the quality of the data to ensure it is free of duplicates and deactivated services

## Executing the implementation

**Bridging the gap between business and tech:** Ensuring nCino is tailored to your business processes



### Project team

Include representatives from both business and technology groups in the core project team to be involved in key decisions



### Goals and scope

Align on scope at the onset of the program to ensure business needs are met within the technology and program guardrails



### Governance

Promote transparency, accountability, and sponsorship through a regular cadence of leadership calls and program reporting

**Importance of change management:** Setting up for successful adoption

Numerous products, source systems, and stakeholder groups involved in treasury means **change management is imperative** for your nCino Treasury transformation.



Align impacted stakeholder groups on their use of the platform early—ensure there is consistent and continuous communication as to how their work will change with nCino as well as anticipated benefits of the platform.

## Managing the platform

**Driving continuous improvement:** Capturing further long-term value

Realizing benefits from nCino Treasury does not end at go-live—Deloitte's **nCino Operate** offering empowers clients to continue to adjust processes, roles, and technology to capture additional value from the platform.

**25%+**

### Further reduction in SLAs

Realized by institutions in the years after their initial release from further process and technology adjustments Include representatives from both business and technology groups in the core project team to be involved in key decisions

**Managing the platform:** Planning for future nCino enhancements

Support continuous delivery through deployment of backlog enhancements, platform maintenance, and planning for nCino's semiannual releases.

- **Planning** – Organizing to meet day-to-day and long-term goals
- **Servicing** – Environment strategy to support IT & DevOps needs
- **Managing** – Robust process for support services to meet SLAs
- **Reporting** – Daily dashboards and predictive insights