



NEXT STEPSM

Your Advocate for High-Risk Technology Initiatives



Ensuring Progressive Financial Institutions Succeed with High-Risk Technology Initiatives

www.NextStepInc.com

CONSULTING LEADERS

Helping You Achieve the Highest Level of Success



Next Step is one of the financial industry's most trusted and specialized consulting firms. We provide hands-on project management and leadership to help growing credit unions and banks successfully accomplish their high-risk technology projects.

Our emphasis is on core operating systems, digital banking solutions, loan origination systems, debit and credit card processing solutions, financial/accounting systems, and other key ancillary systems.

We provide Project Management, Risk Management, and Advisory Services designed for success and supported by processes built by us from the ground up.

With Next Step, you can count on methodologies and expertise that produce the best results.



Strategic Technology Assessments



Vendor/System Evaluations & Selections



Vendor Contract Negotiations



Conversion & Implementation Management, including Mergers



High Impact Process Improvement & System Utilization

Your Trusted Advocate

Next Step's team of seasoned professionals has extensive knowledge of banking operations and the technology financial institutions need to grow and succeed. We have earned the unwavering trust of our clients by passionately serving them with absolute integrity since 1995.

Hands-On Leadership Every Step of the Way

Our methodologies focus on managing the risks inherent with major technology initiatives, thereby saving you from difficult clean-up phases, crises, and budget overruns.

We provide completely unbiased perspective with no financial ties to the vendors, yet with an "insider's knowledge" of their solutions.

Specialized Risk Management

Our engagements involve high priority technology initiatives which demand the best processes, strategies, and people to accomplish the stated objectives. Our clients trust us because we apply our specialized methodologies, tools, and experience, and we work smarter and harder than any other company to ensure your success. This is our passion and our commitment every day.

No one can speak more confidently and powerfully to you than our clients, your peers.

Read our client testimonials by visiting:

www.NextStepInc.com/clients

"I'd call upon Next Step ten times over if I had to do this again."

Bonnie Schmitz, SVP of IT, Neighborhood Credit Union

A STEP IN THE RIGHT DIRECTION

With Next Step, you are engaging with true specialists with a unique combination of vendor and banking experience.

Our clients characterize us as:

- ▲ Extremely knowledgeable of credit union and banking operations and management
- ▲ Possessing a thorough understanding of the technology vendor landscape
- ▲ Comprehensive, customized (adapt to your needs), and 100% objective
- ▲ Practical and trusted with a proven track record of successful conversions



CLIENT HIGHLIGHTS

Credit Unions

Navy Army Community, TX
United Nations Federal, NY
Allegacy Federal, NC
American Airlines Federal, TX
Ascend Federal, TN

Banks

Liberty Bank, CT
Investors Bank, NJ
Ridgewood Savings Bank, NY
Bank Iowa, IA
Fairfield County Bank, CT

"We never skipped a beat, thanks to Next Step's project methodology."

*Barry Abramowitz,
Liberty Bank*



"We are totally focused on advocating on behalf of our clients and building true partnerships with their software providers."

*Trisa Wetzel,
Next Step Executive Director*

Next Step serves as much more than just an advisor who knows the vendors and collects information databases. We take a very involved approach, enabling us to understand your organization at the deepest level. Next Step serves as your Project & Risk Manager on a day to day basis with your team and vendors.

When a conversion is necessary...

Our unique, 11-point risk management methodology secures a successful and timely conversion.

Taking care of your share of the work in an expert manner makes a huge difference in the results. You will go into conversion ready and confident, and the vendor will also be positioned for one of their best conversions.

With Next Step, everyone wins.

STAY IN-THE-KNOW WITH VENDOR WATCH

Next Step helps you stay current with the latest major vendor news. Visit **Vendor Watch** for more information.

Do you have a particular project in mind? Fill out our **Contact Form** for more information on our services.

Vendor WatchSM

Powered by Next Step



"Next Step made our lives easier, saving time and frustration, as our teams moved through the changes necessary to secure a great conversion. Next Step is focused and knows the risks that have to be addressed during a core system initiative."

*Charlie Lai, EVP & CIO,
Fairwinds Credit Union*

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