

Q2 Advisory Services

Own your roadmap, transform your business

Financial institutions are under pressure

Customer expectations—especially for seamless digital experiences—have never been higher. And if you're slow to meet these expectations, there are plenty of competitors who will. So how do you understand shifting customer needs and quickly develop the products you need to protect and grow your business—all while faced with limited time, budgets, and resources?

Q2 Advisory Services is here

Our expert Advisory and Integrated Services teams can help you understand market dynamics, quickly deliver on short-term needs, and plan your digital roadmap. And when it's time to execute on that roadmap, we provide a dedicated technical team that can deliver faster and more cost-effectively than you may be able to do on your own.

The outcomes you need

Launch new products with confidence

Introducing new digital products requires technical expertise, organizational readiness, and strong communication. We ensure that:

- Technical requirements and constraints are understood and addressed prior to launch
- Internal stakeholders are trained so they can manage the product internally and explain it to account holders
- Go-to-market tools and resources are in place to generate account holder demand for the product

Develop your strategic roadmap

Managing existing systems and account holders is a full-time job. So how do you deliver the initiatives that will fuel your future? Partner with us to:

- Maintain an ongoing understanding of external market forces—competition, customer trends, area growth patterns, and more
- Identify and prioritize strategic growth opportunities
- Plan a digital roadmap and establish metrics against which progress can be measured



Execute quickly on key objectives

Having a vision for innovation is crucial. But with limited resources and increasing competition, time is not on your side. We can help you:

- Execute on your strategic roadmap 2-3 times faster than on your own
- Generate significant labor savings compared to using internal development teams
- Tackle multiple workstreams in parallel rather than waiting to complete one before you begin the next

Break into new markets

Whether entering new geographies or seeking to serve new segments, capturing new ground requires a strong strategic plan. Partner with us to:

- Develop a thorough analysis of the evolving needs of your markets
- Understand the competitive landscape, and where you have the potential to win
- Quickly develop digital products and services to meet identified demand

The services we offer

Consulting

When it's time to turn your vision into real programs and plans:

- Digital process improvement plan
- Lending transformation
- Digital organizational readiness
- Fintech strategy
- Business banking strategy
- Data usage strategy with growth services

Advanced Delivery

When your team needs help executing your digital roadmap:

- Platform site evaluation
- Console, SDK, SMART, and commercial banking certifications
- Implementation organizational readiness
- Client-side project management
- Platform security assessment
- Q2 SMART implementation

Digital Self-Service

When you need to help your users and teams utilize your systems effectively:

- Branded videos and documents
- Account opening and Switch Kit
- SMART campaigns
- Contact center best practices and scripts

Q2 is a leading provider of digital transformation solutions for financial services, serving banks, credit unions, alternative finance companies, and fintechs in the U.S. and internationally.

For more information, go to Q2.com or call (833) 444-3469.