

BDO Dynamics 365 Transformation Toolkit for Banks & Credit Unions

Transform your business with BDO Dynamics 365 Transformation Toolkit for Banks & Credit Unions.

BDO DYNAMICS 365 TRANSFORMATION TOOLKIT FOR BANKS & CREDIT UNIONS OVERVIEW

BDO's Banks & Credit Unions Toolkit provides a unique set of tools, accelerators, and business strategies for Banks & Credit Unions, powered by Microsoft Dynamics 365 for Financial Services. BDO's transformation approach emphasizes outcomes, process improvement, and organizational change management to help organizations drive meaningful value from their investment.

BDO brings proven Financial Services industry experience to lead your organization through transformation, delivering a solution that blends industry best practices with your company's unique set of goals.

BDO DYNAMICS 365 TRANSFORMATION TOOLKIT FOR BANKS & CREDIT UNIONS BUSINESS CASES



Implement a unified data strategy, eliminating siloed data and disparate systems across marketing, sales, and customer service increasing customer loyalty



Improve data integrity and system performance ensuring client data is accurate, consistent, and reliable



Establish a scalable foundation for future applications to expand digital capabilities, allowing adaptability to changing customer needs



Gain operational benefits and cost savings with solutions to data inconsistencies so your business can operate efficiently, reducing costs with data management

STEPS FOR A SUCCESSFUL BDO DYNAMICS 365 TRANSFORMATION TOOLKIT FOR BANKS & CREDIT UNIONS IMPLEMENTATION

1. Alignment on your desired business outcomes and transformation goals
2. Design effective processes to achieve defined outcomes
3. Develop implementation strategy, required reports, and process workflows
4. Implement Microsoft Dynamics 365, deploy workflows, and build dashboards
5. Create KPI's and process feedback to enable the cycle of continuous improvement
6. Activate adoption and change management support

DYNAMICS 365 TRANSFORMATION TOOLKIT IMPLEMENTATION KEY DELIVERABLES INCLUDE

Our Transformation Toolkit empowers companies to transform challenges into strategic opportunities for growth and innovation, breaking free from digital concrete.

- ▶ Program Management and Transformation Accelerators
- ▶ Prescriptive templates for processes and configurations specific to Banks and Credit Unions
- ▶ Purpose-built reporting and analytics for Banks and Credit Unions
- ▶ Pre-built connectors for Banks and Credit Union ERP solutions
- ▶ Microsoft Dynamics 365 for Financial Services Deployment

WHY CHOOSE BDO DIGITAL



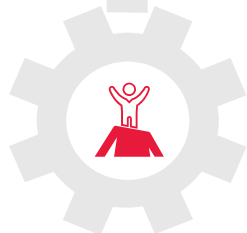
Get it Right from the Start

BDO's Digital Transformation team includes seasoned business leaders with the experience to understand your organization and recommend the right processes and technology to achieve your business outcomes.



Broad Capabilities

Working alongside BDO, you tap into a global advisory network with experienced professionals who understand every facet of your industry and business.



Accelerate Your Success

BDO's Banks & Credit Union Toolkit is designed to support a streamlined transformation—helping your institution realize business value faster. Beyond implementation, BDO remains engaged to support ongoing success and help your team sustain value over the long term

***Pricing will vary based on the scope of the engagement**

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