

Professional Services - Lending

COMMERCIAL | SMALL BUSINESS | CONSUMER DIRECT & INDIRECT

Optimize your investment in Baker Hill lending solutions by leveraging over 30 years of expertise.

Service Retainers. An annual retainer option can be used for post-production services like training, advisory services, and post-implementation change orders.

Standard & Custom Training. Empower users with standard or custom training to cover a variety of topics tailored to your needs. Training is offered in multiple formats (on-site, via webinar, at Baker Hill).



Client Support Services.

- **One-Time Weekend Support.** We provide cross-over or weekend support to address your IT timelines.
- **Admin-as-a-Service (AaaS).** Baker Hill acts as the primary system administrator for your databases. You submit database change requests or standard maintenance items to a dedicated technical account manager (TAM) and we perform the rest, providing you:
 - Access to a dedicated TAM to satisfy all maintenance requests
 - Regular meetings with Baker Hill Support to provide updates on enhancements and changes
 - Peace of mind knowing that product experts are regularly reviewing your database for the most optimal performance
 - Savings on internal resource investments needed to maintain your Baker Hill solutions

WHY BAKER HILL PROFESSIONAL SERVICES? Rely on over 30 years of industry expertise to help you optimize the performance of your Baker Hill lending solutions and maximize your investment in financial technology.

 800.821.8664
www.bakerhill.com

CONNECT Explore how your institution can maximize your investment in Baker Hill solutions. To learn more, contact your Account Executive at 800.821.8664 or visit bakerhill.com and click any Free Consultation or Get a Demo button.

Advisory Services

- **General Consulting.** We conduct working sessions with you to assist with loan policy and process reviews that do not include a system configuration review.
- **Branch Manager & Small Business Lender Training.** Our team trains your branch staff on business lending fundamentals in a one-day session tailored to your specific needs.
- **Document & Reporting Add-Ons.** Streamline processes by integrating with your document preparation systems. We can customize other documents and reports so you can focus on growing and managing your business.
- **Strategy & Configuration Review for Small Business, Consumer Direct and/or Indirect Lending.** During a three-day on-site engagement, we review your credit policy, process, products, pricing, roles and other best practices. Based on findings, our team makes tactical and strategic recommendations, documents a list of configuration changes and performs all approved changes.
- **Strategy & Configuration Review for Commercial Lending.** During a 1 or 2-day on-site engagement, we review credit policy, process, products, pricing, and roles associated with commercial lending and/or portfolio risk management, and leave you with documented strategic recommended tactical configuration changes.
- **Portfolio Risk Management – Rules Review.** During this 1 or 2-day on-site project, we evaluate and discuss system rules, rule calibrations, reporting, portfolio management processes, and workflows, and leave you with documented best practices and recommended configuration changes.
- **Scorecard Management.**
 - **Evaluation Cutoff Strategy Review – Scoring Fine Tuning.** Once you have decisioned 300+ new dollar applications, we analyze the data to determine the actual decisioning practices, allowing you to:
 - Calibrate the mid-point of your gray area strategy
 - Verify that applications are being decisioned consistently
 - Prioritize system configuration changes based on findings
 - **Full Gray Area Strategy – Scoring Fine Tuning.** By using scores and appropriate credit policy messages, we analyze your decisioning data to create an auto decisioning strategy that is aligned with your manual process.
 - **Implementation Analyst Services.** Change is constant. Allow us to ensure your Baker Hill solutions leverage all possible data sources as they expand or change. From core conversions, data extractions or basic database maintenance, Baker Hill's professional services team ensures your data insights are accurate.
 - **Scheduled Extractions for Security Monitoring.**

Baker Hill® is a leading provider of technology solutions for common loan origination, relationship management, business intelligence, decisioning, and CRM tools. As the #1 provider of member business lending services, Baker Hill serves 600 financial institutions, including more than 20% of the top 150 U.S. banks and 20% of the top 25 U.S. credit unions.

