

jack henry strategy summit

**Future-Ready Banking:**  
**Strategies for Growth, Security, and Efficiency**

January 27 – January 29, 2026

Strategy Summit | Session #1

# Operational Excellence:

Modernizing Processes, Relationships,  
and Service Delivery

**jack henry**<sup>™</sup>

01/27/2026



- **about the presenters**



**rich dunklee**

Senior Technical Product Manager,  
Workflow Solutions



**scott gleason**

Solution Specialist



**casey johnson**

Solution Specialist,  
Jack Henry Bank Solutions



**joyce rains**

Senior Director,  
JHA Client Services Consulting™

- **workflow**

**How do we manage our daily  
business operations?**

# what is “workflow”?

**Business Process Management (BPM)** - Automating actions or steps within a specific process or task.

**Workflow Management** - Managing the flow of work between people, teams, products, vendor partners, and processes.



- workflow

**60–70% of the “work” required to automate a business process happens in planning and discovery.**

# Polling Question #1

**When planning your own business process management activities, does the figure of 60–70% of your time spent in planning and discovery match your institution's observations?**

- a) Yes, 60–70% seems about right.
- b) We're probably a bit higher at 70–80% (or more).
- c) No, we're below 60% of our time spent in planning.

- **workflow**

# How a workflow application can help

## **compartmentalizing**

Converting a manual process or an idea into a functional automation requires the planner to break the process down and compartmentalize the steps.

## **refining a process**

*“Because we’ve always done it that way...”.*

This is a great opportunity to practice operational excellence by focusing on how we can make a process more efficient and user-friendly.

- **workflow**

# How a workflow application can help

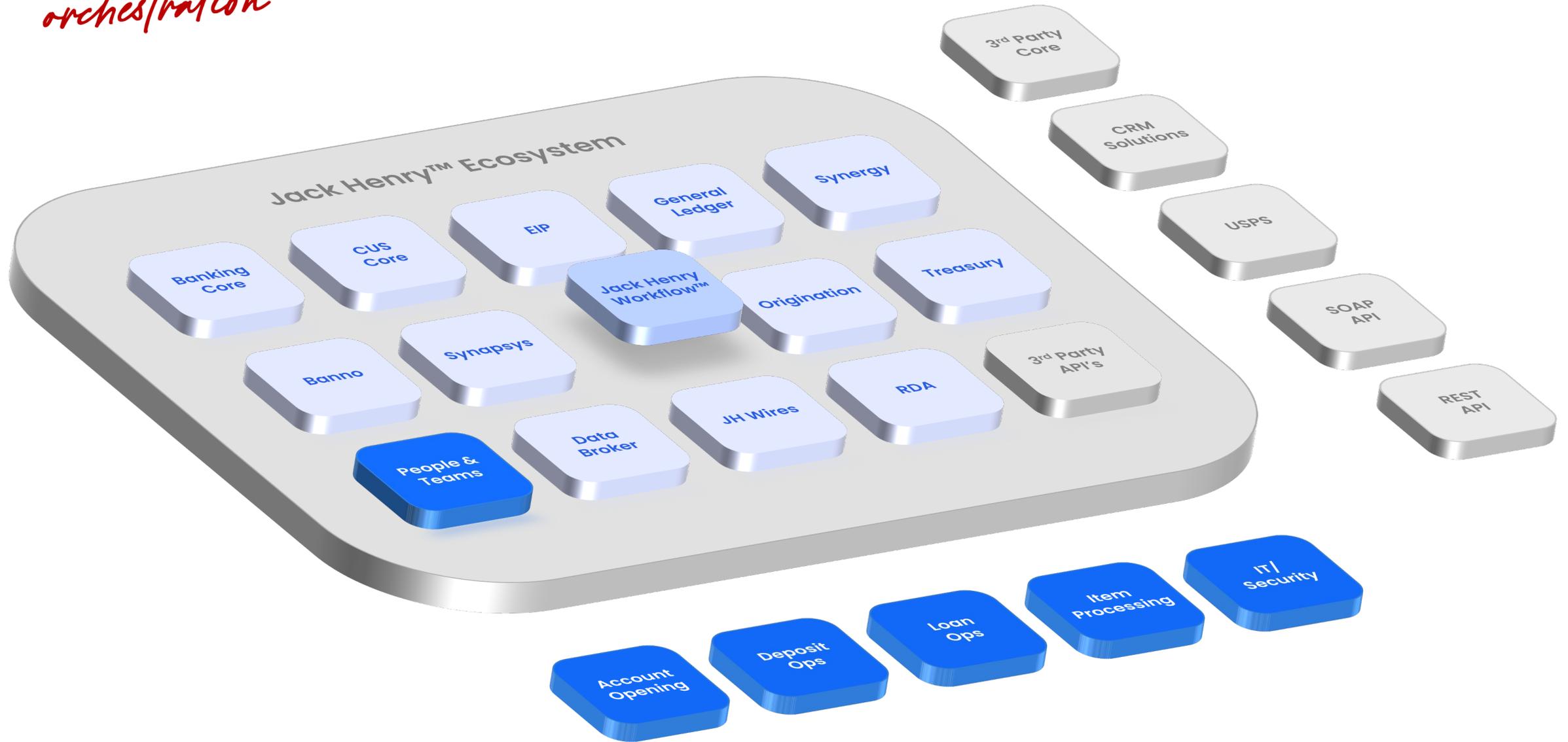
## **Narrative artifacts**

The process of analyzing business processes affords teams the opportunity to create BPMN narrative documents and diagrams for validation, training, approval, and audit purposes.

## **building automations**

A good business process automation application should provide a set of tools that allow you to mirror and enhance your defined process.

- ~~Automation~~: cross product and cross team  
*orchestration*



- **workflow**



## **orchestration**

Workflow orchestrates complex business processes, uniting people, departments, external sources, and process in an automated, repeatable way.



## **automation**

Business processes can be developed and scheduled for automated, unattended operations.



## **expertise**

Our Business Consulting team can provide Workflow-specific support and guidance on planning, developing, and building business process automations.

# **Empower Your Success through Access**

- **Data**
- **Visibility**
- **Mobility**



## **Feature Products**

- **Synapsys**
- **Branch Anywhere**

# **Synapsys**

- **CRM tool**
- **Document interactions with clients and share information across the organization**
- **360 View of Customers and Prospects**
- **Enterprise Integration**
- **Sales, Service, Marketing**



# **Branch Anywhere**

- **Mobile application**
- **Access to many JH Solutions**
  - **20% of tasks you do, 80% of the time**
- **Responsive design native to device**
- **Intuitive, mobile friendly UI**



# **Data**

- **Core and External Sources**
- **Products & Services**
- **Events and Activities**
- **Miscellaneous, Relationship  
empowering information**



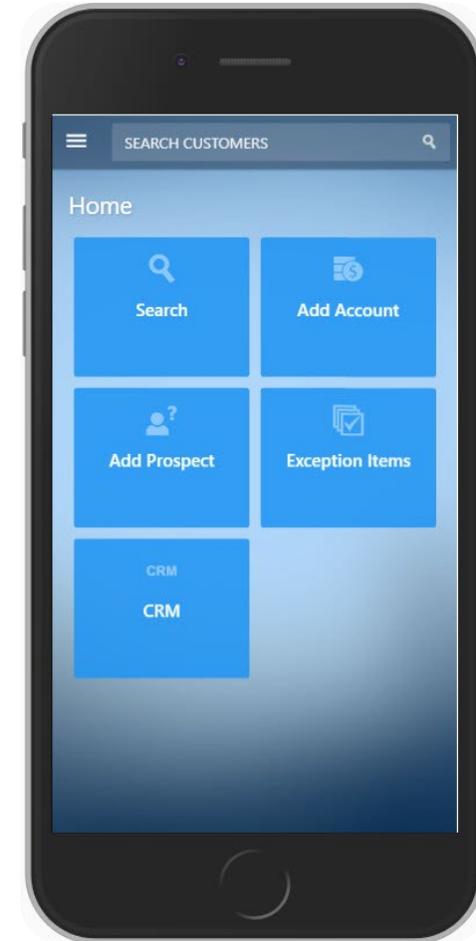
# **Visibility**

- **Events and Activities**
- **Enterprise-wide access, across various solutions**
- **One source of record**



# Mobility

- **Synapsys within Branch Anywhere**
- **Prospecting**
- **Integration**
  - **Enterprise Workflow**
  - **Send to Xperience**



# Empower Your Success through Access

- **Data**
- **Visibility**
- **Mobility**



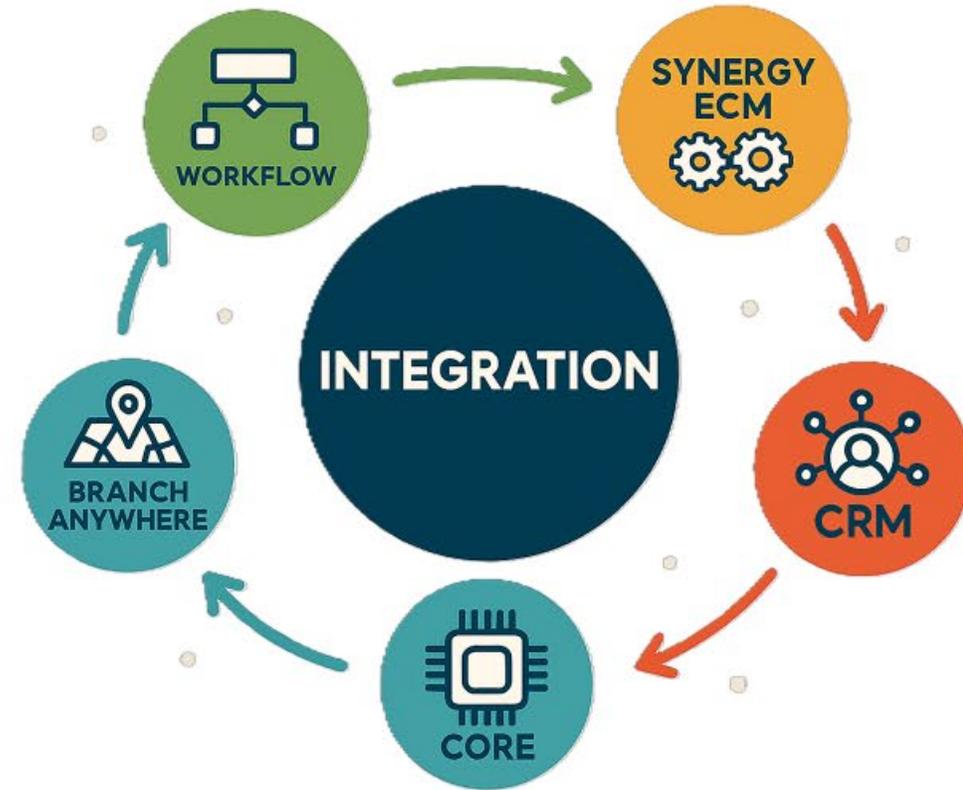
# **Empower Your Success through Access**

- **Synapsys CRM**
- **Branch Anywhere**



## Featured Products

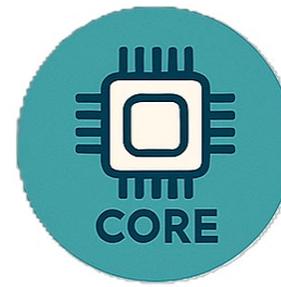
- Synergy
  - ECM
  - Doc Tracking
- Synergy Sign



Modernizing Processes

# Synergy Enterprise Content Management

Seamless document access  
-when you need it  
-where you need it



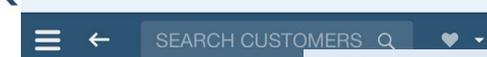
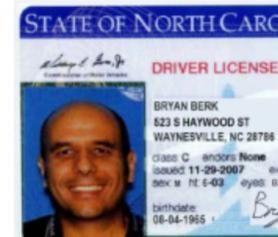
Bryan Berk

523 S Haywood St  
Waynesville NC 28786  
▶ Additional Addresses

Relationship: **Primary account**  
Date of Birth: **08/04/1965**  
Tax ID: **174-04-9260**  
🏠 (417)669-4034  
📞 (417)669-4034  
🏢 (252)555-0199  
✉ [bryanberk14@gmail.com](mailto:bryanberk14@gmail.com)

- 💰 Demand Deposits (16)
- 📄 Loans (9)
- 🕒 Time Deposits (7)
- 📁 Misc. Accounts (7)

Driver's License: **543849571**



## Document Images

Bryan Berk  
[Capture Image](#)

Filter

**DEATH CERTIFICATE**  
03/17/2022

**IDENTIFICATION**  
10/28/2014

**IDENTIFICATION**  
10/28/2014

**IDENTIFICATION**  
09/26/2014

**IDENTIFICATION**  
09/26/2014

## Workflow Queue

Queue : 15 Activities  
[Details](#) [Work](#) [Reassign](#) [Lock](#) [History](#)

WF Name	Comments
Wire - Outgoing Back Office Approval	+ Add Filter
How To Guide and Procedures	
Stop Payment (Synapsys/EES)	
Reg E Dispute Processing (EES)	
ACH Transfer	
DocTrack New Checklist Review	
DocTrack Expired Financial Statement	
DocTrack Status with E mail V #3	
DocTrack New Checklist Review	
Wire - Outgoing Back Office Approval	

Attachments (3)	Comments
Open Remove	
eSign Audit 1	eSign Audit 1 1/26/2026 5:36 PM - svc-ewf-02230935
eSign Audit 2	eSign Audit 2 1/26/2026 5:36 PM - svc-ewf-02230935
WireXferForm	WireXferForm 48f39c8a-f83b-40d0-b7aa-56c7c9fe3b96 1/26/2026 5:36 PM - SGleason

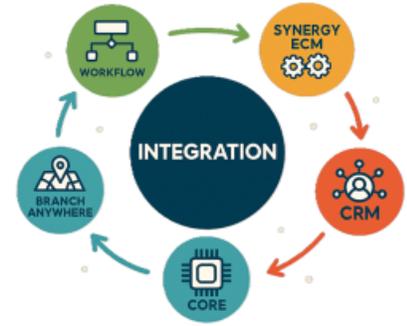
Varishlae (61)

# Synergy Sign

- **Modern approach**
- **Connect with your customers**
  - **In person and remote**
  - **Request to sign, Request to send**
- **Deliver documents conveniently, Efficiently**



# Modernizing Processes, Relationships, Service Delivery



# Synergy Doc Tracking

Checklist Name	Checklist Status	ACCOUNT NUM
Consumer Loan	Complete	10001776
Consumer Loan	Complete	11002225
Consumer Loan	Incomplete	9001777
Consumer Loan	Incomplete	

### Activity DocTrack Expired Financial Statement

Expired Documents - ID 5586461

Complete | Save | Cancel | Details | Reassign | Lock | History

1 Please review the completed checklist for loan 9001777 and recommend additional action.

Send eMail to customer requesting updated financials

**Comments**

+ Add | Filter

Comments (1)

Open | Remove

	Current	10001776	LOANS CABINET	COMPLIANCE REPORT
	Current	10001776	LOANS CABINET	DISBURSEMENT REQUEST & AUTH-
	Current	10001776	LOANS CABINET	PRIVACY POLICY
	Current	10001776	CIF CABINET	FS FINANCIAL STATEMENT
	Expired Doc	10001776	CIF CABINET	
	Waived	10001776	LOANS CABINET	

From: Brian Berk <bberk@ovation.com>  
**subject:** Regarding Commercial Loan ending in 1776

Hello Brian Berk,

This is a courtesy email to remind you that the financials for account number 10001776 has recently expired. Please contact Scott Gleason at Ovation Bank at your earliest convenience. This type of load requires a current financial statement on file.

Financials Requested

# Strategies for Growth, Security, and Efficiency

## Synergy ECM

- **Documents**
  - Auto Import
  - ID Scan
  - eMail Assist
  - Capture
- **Reports**

## Productivity modules

- **Document Tracking**
- **eDistribution**
- **Advanced PDF**
- **Power Search**

## Capture

- **Synergy Sign**
- **Advanced Document Recognition**



JHA Client Services Consulting™

# Driving Value through Expertise and Innovation

jack henry™



- **Building Business Solutions**

Product Utilization

Process Efficiency

Expense Reduction

Revenue Growth

Improved Employee and Client Experience



## ● Workstream Optimization

- Targets a specific functional area
- Evaluates end-to-end processes holistically
- Identifies better ways to use existing tools / automation
- Explores emerging technologies
- Provides workstream analytics

Workstream	Function	Jack Henry Products
<b>Account Origination</b>	Account Origination – Deposits, Loans & Online	Argo, Onboard, Loan Vantage, JHA Open Anywhere, StreamLine, Branch Anywhere, jhaEnterprise Workflow
<b>Digital</b>	Online Banking, Online Payments, & Online Account Origination	Banno, EPS RDA, iPay, PayCenter/Zelle, JHA OpenAnywhere, Faster Payment Fraud (Financial Crimes Defender/YellowHammer), jhaEnterprise Workflow
<b>SMB/Commercial</b>	Business Online Banking & Commercial Services	Banno Business, JHA Treasury Management, EPS RDC, iPay Business, Tap2Local, jhaEnterprise Workflow
<b>Debit Card</b>	Cards/ATMs	CPS Debit, jhaEnterprise Workflow
<b>Process Automation</b>	Automation & Integration	jhaEnterprise Workflow, Branch Anywhere, Synapsys, Synergy
<b>Loyalty &amp; Rewards</b>	Loyalty & Rewards	Jack Henry Loyalty & Rewards

- **Account Origination Optimization Consulting**

Our Account Origination Optimization Engagement provides a comprehensive assessment of your current account-opening workflows. This includes reviewing related processes that may be streamlined or automated through jhaEnterprise Workflow (e.g., core maintenance).

Scope of Origination Process Review

- Digital/Online Account Opening
- Deposit Account Opening
- Loan Account Opening

Included Solution Parameter Reviews

- Open Anywhere
- Onboard Deposits
- Argo Deposits
- Onboard Loans
- Loan Vantage



- **Digital Optimization Consulting**

Our Digital Optimization Engagement is a comprehensive review of your existing digital products and services and includes a Digital Strategy session where the following topics are covered:

- Productivity and integration
- Digital reporting
- Digital payments
- Customer experience
- Review of digital products and services:
  - Banno Platform™
  - iPay Bill Pay™
  - JHA SmartPay Platform™
  - JHA OpenAnywhere™
  - JHA PayCenter™
  - Risk insights for Zelle



- **Small & Medium Business (SMB) Consulting**

Our Small and Medium Business Strategy Engagement delivers a comprehensive review of your deposit products and banking services, with focus on product adoption, pricing effectiveness, and uncovering opportunities to drive deposit growth within SMB segment.

This engagement also includes:

- SMB Deposit Growth Strategy Workshop
  - Needs analysis by segment
  - Alignment of segmentation to products and services
  - Sales and Marketing initiatives
  - Success metrics and measurement



- **CPS Debit Card Optimization Consulting**

For this engagement, CSC partners with the CPS team to perform a comprehensive current-state assessment of CPS products. This includes an in-depth review of system parameters and an evaluation of existing services.

Drawing from these insights, CSC and CPS jointly deliver actionable recommendations designed to optimize product utilization, strengthen operational processes, and identify opportunities for improved technology integration.

CPS product list:

- CPS JHA Card Analytics
- CPS JHA Card Fraud Center
- CPS JHA Debit Processing
- CPS JHA Enhanced ATM Driving
- CPS JHA PIN Mgt
- CPS JHA Tokenization
- CPS MyCardRules



## ● Jack Henry Loyalty & Rewards™ Strategy Engagement

As companion to Jack Henry Loyalty & Rewards, our Strategy Engagement is designed to evaluate existing loyalty & reward programs, extract key insights, and provide recommendations on configuration of Jack Henry Loyalty and Reward concepts. This engagement also includes:

- Comprehensive assessment of current reward program (if applicable)
- Definition of new reward business requirements
- Strategy Meeting where these topics are included:
  - Organizational vision and reward goals
  - Industry loyalty trends
  - Program objectives
  - Strategic Planning for Jack Henry Loyalty and Reward concepts



- **jhaEnterprise Workflow™ Strategy Session and Design**

We recommend leveraging our jhaEnterprise Workflow Strategy Session & Design engagements to uncover opportunities for improving productivity:

- Workflow Process Automation Strategy
- Workflow Process Automation Design
- EWF Build & Implementation



- **Process Automation Opportunities**

## **Retail/Branch**

Account maintenance automation

Address change automation

Leverage eSign with platform

Wire transfer request

Debit card ordering/maintenance

Debit card dispute

## **Digital/Treasury Management**

Address change automation

Stop payment automation

TM contract preparation

eSign with TM contracts

TM Maintenance automation

## **Deposit & Loan Operations**

Death notification

Return mail automation

Overdraft refund

Loan payoff request

HELOC maintenance

Loan fee waiver

- Benefits of Ownership – Average Cost Benefits by Leveraging EWF with Multiple JH Products**

### Estimated Cost Benefits adding EWF integration to Core

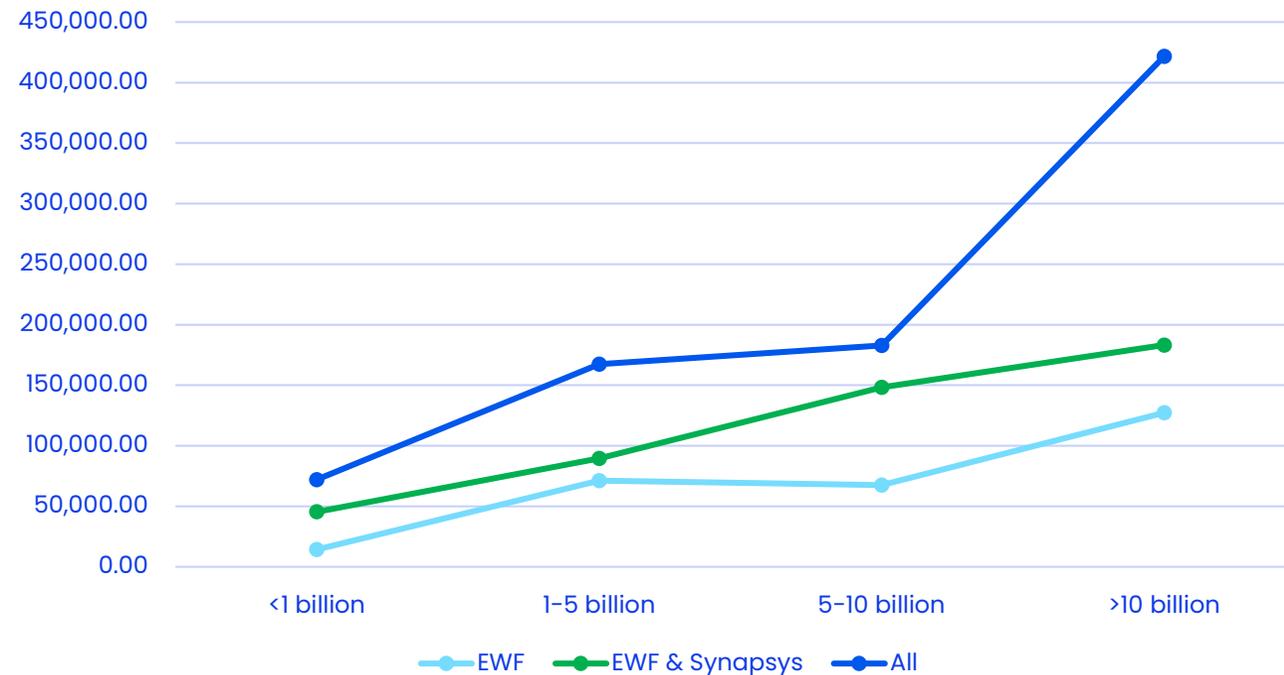
Asset Size	EWF
<1 billion	14,220.00
1-5 billion	71,245.33
5-10 billion	67,622.00
>10 billion	127,251.25

### Estimated Cost Benefits adding EWF integration to Core & Synapsys

Asset Size	EWF & Synapsys
<1 billion	45,377.00
1-5 billion	89,494.00
5-10 billion	148,344.50
>10 billion	183,210.67

### Estimated Cost Benefits adding EWF integration to Core

Asset Size	All
<1 billion	72,028.50
1-5 billion	167,304.50
5-10 billion	182,753.25
>10 billion	421,587.60



- **Why JHA Client Services Consulting?**



## **Relationship**

We're invested in the **relationship** and in it for the long haul. **Your success is our success.**



## **Expertise**

Our consulting team has the **cross-product expertise** to help you understand how to best optimize usage of JH products and integration touchpoints.



## **Strategy**

We work with you to incorporate your **growth strategies and goals into a formal plan**; helping you build a roadmap that makes sense for you.

# Polling Question #2

**I would like to speak with a sales representative about the following Jack Henry solutions:** *Select all that apply.*

- jhaEnterprise Workflow™** – Business Process Management
- Branch Anywhere™** – Mobile Application Platform
- Synapsys®** – Accountholder Relationship Management and Marketing
- Synergy Enterprise Content Management™** – Imaging and Storage Technology
- JHA Client Services Consulting™** – Tech & Operational Consulting Services (for Banks)
- SymAdvisor™** – Tech & Operational Consulting Services (for Credit Unions)

# Polling Question #3

**What topics would you like to see covered on the next Strategy Summit?** *Select all that apply.*

- Overcoming Revenue Challenges
- Reducing Risk and Fraud
- Operating More Efficiently
- Improving the Accountholder Experience
- Attracting and Growing Commercial Accounts
- Empowering Accountholder Financial Health
- Improving Infrastructure
- Getting More Value from Tech and Vendor Relationships

The image features a dark blue background with three overlapping circles of a lighter blue color. The circles are arranged horizontally, with the central circle overlapping the two outer ones. In the center of the overlapping area, the word "questions?" is written in a bold, white, sans-serif font.

**questions?**



**if you  
remember  
nothing else...**

- if you remember nothing else...

## Remember This:

### automation that frees your teams

Business process automation solutions like **jhaEnterprise Workflow** reduce friction and create more capacity for your teams to focus on meaningful, relationship-driven work.

### integrated tools that strengthen service

**Branch Anywhere, Synapsys, and Synergy ECM** work together to extend service, deepen insight, and centralize information - helping you build more connected, modern service delivery.

### expert guidance that accelerates progress

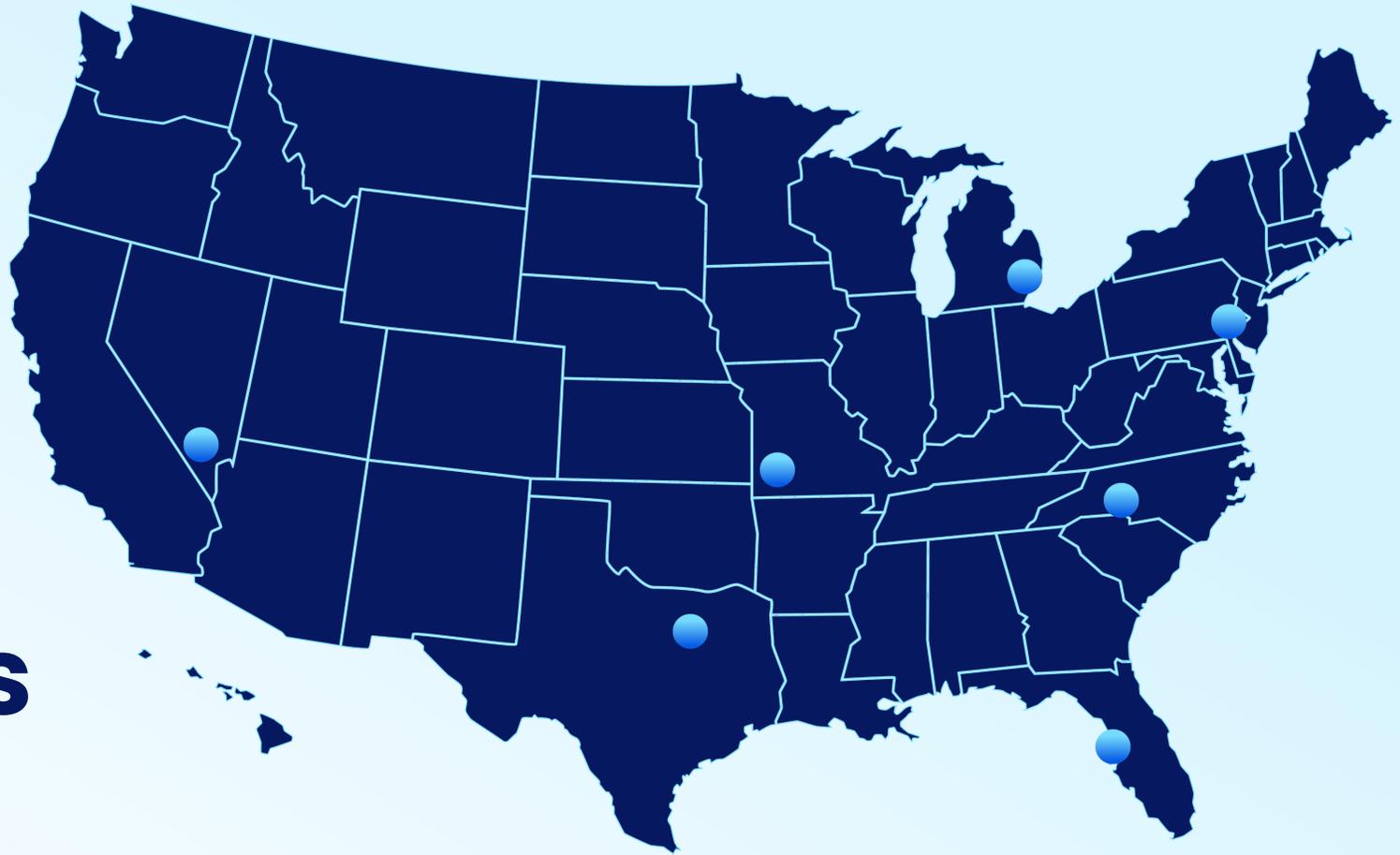
**JHA Client Services Consulting** helps you uncover operational improvements and maximize your technology investments with support from experts who understand your banking environment.

Visit [jackhenry.com/events](https://jackhenry.com/events) for more information

Coming to a city near you...

# cybersecurity & fraud and digital banking forums

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Charlotte, NC – November 5 & 6

Dallas, TX – April 15 & 16

Philadelphia, PA – June 24 & 25

Tampa, FL – January 21 & 22

Springfield, MO\* – April 29

(\*Cybersecurity & Fraud Forum Only)

Las Vegas, NV – March 11 & 12

Detroit, MI – May 27 & 28

**jack henry**<sup>TM</sup>

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