

# What a Valusync 90-Day Sprint looks like, and what it delivers.

A structured, supported, full-production engagement. In 90 days your frontline team has better tools, your members or customers have a more personal digital experience, and your leadership has clear data to make the next decision.

## WHAT THE SPRINT DELIVERS

### Personalized financial guidance, in the digital channel

A branded experience that walks your members or customers through a financial picture and delivers plain-language guidance tailored to their situation. Every recommendation includes a clear explanation of why it was made, visible to your compliance team and the person receiving it.

### Smart product matching at the right moment

Connects members and customers with the products that fit their actual financial needs, not a generic offer list. Product matching logic is configured to your institution's product catalog and member segments during the setup phase.

### Automated data collection and workflow relief

Removes the manual steps that tie up your frontline team: new account data collection, follow-up scheduling, and intake forms, so staff time goes toward the conversations that build real relationships.

### Compliance-ready from day one

SOC 2 Type I in progress with Thoropass. GLBA, NIST, FDIC, and NCUA aligned. Every engagement includes a Data Processing Agreement and technical documentation for your risk and IT teams. Built for regulated institutions, not retrofitted for them.

## WHAT YOUR INSTITUTION COMMITS TO

### Internal champion + IT contact

One VP- or Director-level point of contact with day-to-day decision authority, and one IT contact to place and test the iframe embed. Typically 2-4 hours total for IT.

### Iframe-capable property

An existing member- or customer-facing web property that can embed an HTML iframe. No native app development required.

### Baseline data access

Anonymized or aggregated data to establish KPI baselines: interaction time logs, acquisition cost, and deposit growth metrics.

### Legal sign-off

One legal or compliance contact to review and sign a Data Processing Agreement. Typically completed in Phase 2 within 1-2 weeks.

### Weekly check-in calls

30 minutes per week with your internal champion during the live sprint. Monthly 60-minute review with broader leadership.

### Case study + co-branded content

Agreement to participate in a joint case study and 3-5 co-branded social media posts within 90 days of sprint completion.

## MEASURABLE OUTCOMES YOU TRACK

# 20+ min

### saved per account interaction

Your frontline team gets that time back for the conversations that build lasting member and customer loyalty.

# 10%

### reduction in acquisition cost

Smarter onboarding and automated intake reduce the cost of every new account relationship your institution brings in.

# 22%

### of people select a second product to explore

Real share-of-wallet growth driven by personalized guidance, not a generic cross-sell prompt.

# \$1,800

### per year in member financial health

Measured via an agreed proxy: savings balance trajectory, loan-to-income ratio, or credit score band.

**THE 5 SPRINT PHASES**

	WHAT HAPPENS	KEY DELIVERABLE	EXIT CRITERIA
<b>1 Intake &amp; Goal Setting</b> Weeks 1–2	Kickoff call, segment definition, KPI baseline capture, sprint agreement.	Signed sprint agreement + KPI baseline snapshot.	All 5 KPI baselines captured. IT contact confirmed.
<b>2 Compliance &amp; Tech Connect</b> Weeks 2–3	Legal DPA review and sign-off. IT integration in staging environment. CSP and domain configuration.	Signed DPA. iframe confirmed in staging.	DPA signed. iframe renders correctly in staging. No live deployment without both.
<b>3 Soft Launch</b> Weeks 3–4	Branded embed in sandbox. Staff walkthrough session. Configuration finalized for go-live.	Staff walkthrough completed. Feedback report. Config confirmed.	No blocking UX issues. Champion and frontline staff sign off.
<b>4 90-Day Live Sprint</b> Weeks 4–16	Full production deployment. Weekly check-ins. Monthly leadership reviews. Real-time KPI dashboard.	Weekly KPI snapshots. Dashboard access. Issue log.	90 days completed. All 5 KPIs tracked with sufficient data for ROI review.
<b>5 ROI Review</b> Week 17	Full outcome report. Leadership presentation. Clear recommendation for next steps.	ROI report + executive summary deck + next-steps recommendation.	Report delivered to leadership. Engagement formally closed or transitioned.

**THE 5 KPIS YOU TRACK**

<b>KPI 1</b> <b>Time saved per account interaction</b> Measured via timed sample or CRM log comparison. Baseline captured in Phase 1, remeasured at sprint close for interactions that used the embed. <b>Target: 20+ minutes saved per interaction</b>	<b>KPI 2</b> <b>Member / customer acquisition cost</b> Total marketing spend + onboarding staff hours divided by new accounts opened. Compared across the prior 90-day period vs. sprint period. <b>Target: 10% reduction in acquisition cost</b>
<b>KPI 3</b> <b>Multi-product selection rate</b> Percentage of people who explore a second product after receiving their personalized financial plan. Tracked via in-session event data, no individual PII required. <b>Target: 22% of users select a second product to explore</b>	<b>KPI 4</b> <b>Member / customer financial health</b> Agreed proxy metric (savings balance trajectory, loan-to-income ratio, or credit score band). Baseline and 90-day delta measured at segment level. <b>Target: \$1,800/yr improvement (annualized)</b>
<b>KPI 5</b> <b>Frontline staff satisfaction and time-on-meaningful-work</b> 5-question Likert scale survey (Valusync template) distributed to all frontline staff using the embed. Baseline in Phase 1, same survey at sprint close. Direction and magnitude of change reported; no fixed numerical target, because this KPI reflects your team's experience, not a projection. <b>Target: Measurable improvement in satisfaction and time available for relationship conversations</b>	

**SPRINT TIERS & PRICING**

Community	Regional	National
<b>\$12k-\$20k</b>	<b>\$20k-\$35k</b>	<b>\$35k-\$50k</b>
Community financial institutions Under 50,000 members / customers	Regional institutions 50,000-500,000 members / customers	Super-regional & national Over 500,000 members / customers
<ul style="list-style-type: none"> <li>All three toolkit modules</li> <li>Stackwide plug-and-play integration</li> <li>Dedicated onboarding (Phases 1-3)</li> <li>Weekly check-in calls</li> <li>Sprint dashboard access</li> <li>Phase 5 ROI review report</li> </ul>	<ul style="list-style-type: none"> <li>All three toolkit modules</li> <li>Stackwide plug-and-play integration</li> <li>Dedicated onboarding (Phases 1-3)</li> <li>Weekly + monthly review calls</li> <li>Sprint dashboard access</li> <li>Phase 5 ROI review + exec summary deck</li> </ul>	<ul style="list-style-type: none"> <li>All three toolkit modules</li> <li>Stackwide plug-and-play integration</li> <li>Dedicated onboarding (Phases 1-3)</li> <li>Weekly + monthly leadership reviews</li> <li>Sprint dashboard access</li> <li>Phase 5 ROI review + board-ready summary</li> </ul>

**WHAT'S INCLUDED IN EVERY SPRINT**

✓ Personalized financial guidance module	✓ Smart product matching module	✓ Automated workflow module
✓ Stackwide plug-and-play integration	✓ Branded iframe embed	✓ Data Processing Agreement
✓ SOC 2 / compliance documentation	✓ KPI baseline capture support	✓ Staff walkthrough session
✓ Sprint dashboard (real-time KPIs)	✓ Phase 5 ROI review report	✓ 4-hour response SLA for blocking issues

**SUPPORT DURING YOUR SPRINT**

Check-in cadence	Response SLAs
Weekly 30-min call with your internal champion	Blocking issue (embed down): 4 business hours
Monthly 60-min review with leadership	Non-blocking issue: 1 business day
Ad hoc calls scheduled within 1 business day	Configuration change: 5 business days

READY TO START THE CONVERSATION?






**Let's find out what 90 days can do for your institution.**

Reach out directly or click below to schedule a conversation. We'll confirm your tier, answer compliance questions, and get a sprint kickoff date on the calendar.

[j.lewis@valusyncit.com](mailto:j.lewis@valusyncit.com)  
 valusyncit.com

[Schedule a Call](#)

**RECOGNIZED BY**

				
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