CORE | VIA | APPROACH

THE PIONEER OF IMPLEMENTATION ADVISORY™

Helping Financial Institutions and Technology Providers
Deliver Successful Implementations with Confidence.

Creating Confidence in Implementation.

SERVICES PORTFOLIO

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Independent Implementation Advisory for Financial Services Organizations and Technology Providers

Creating Confidence in Implementation.

01

Portfolio Overview

CoreViaApproach provides independent, vendor-neutral Implementation Advisory designed to improve the conditions in which complex technology implementations succeed. Our services help executives, business teams, project organizations and technology providers work with clearer governance, stronger quality, trusted data, disciplined delivery and better implementation decisions. The portfolio also includes Quality Management & Controls as a standalone operational advisory service for banks and financial institutions.

Our role is not to replace the client or the provider. It is to strengthen the implementation environment in which both must succeed.

Advisory Capability	Core Focus
Implementation Governance	Executive governance, decision rights, steering, reporting, PMO structures, risk and cross-party accountability.
Implementation Delivery Advisory	Execution discipline, planning, milestone governance, issue resolution, cutover, stabilization and delivery leadership.
Project Quality Assurance & Quality Control	Independent quality reviews, methodology assurance, deliverable validation, testing governance and readiness gates.
Project Audit & Recovery	Health checks, independent diagnostics, root-cause analysis and pragmatic recovery roadmaps.
Data Excellence	Migration strategy, cleansing, mapping, reconciliation, mock cycles, cutover controls and data confidence.
AI-Enabled Advisory	Project intelligence, reporting, risk analysis, knowledge management and productivity support with human accountability.
Leadership & Capability Development	Practical training, coaching, workshops, implementation toolkits and team capability building.
Post-Merger & Acquisition Integration Advisory	Post-deal integration governance, IMO support, systems/data consolidation, process alignment, cutover and stabilization.
Quality Management & Controls	Operational quality health checks, process and control assessment, CAPA, KPI/KRI monitoring, management reporting and continuous improvement.

02

How the Portfolio Is Structured

The portfolio combines core implementation advisory capabilities with specialized and operational offers that can be engaged independently or assembled into a broader mandate. The service architecture is intentionally modular so that CoreViaApproach can respond to implementation needs while also supporting selected enterprise operational-quality priorities.

Layer	Offer	Role
Core capability	Implementation Governance	Governance model, PMO, steering, executive assurance and vendor governance.
Core capability	Implementation Delivery Advisory	Planning, coordination, project leadership, cutover and post-go-live stabilization.
Core capability	Quality Assurance & Control	Methodology, deliverable quality, testing, readiness and audit.
Core capability	Data Excellence	Migration, cleansing, reconciliation and cutover data readiness.
Core capability	AI-Enabled Advisory	Project intelligence and decision support.
Specialized offer	PMO-as-a-Service	Practical PMO capability delivered as a managed advisory service.
Specialized offer	Project Director-as-a-Service	Senior implementation leadership for complex or critical initiatives.
Specialized offer	Digitalization & Digitization Advisory	Implementation-oriented roadmaps for operating-model digitalization and workflow digitization.
Specialized offer	Post-M&A Integration	Implementation governance after a merger or acquisition.
Enterprise & operational advisory	Quality Management & Controls	Independent assessment and improvement of operational processes, controls, evidence, corrective actions and quality performance.

One portfolio. Multiple entry points. One objective: successful implementation.

03

Implementation Governance

Implementation governance creates the operating discipline within which scope, decisions, risks, dependencies, vendors and executive priorities are controlled. CoreViaApproach focuses on governance that accelerates delivery rather than creating administrative overhead.

Typical services

- Implementation governance model and decision-right design.
- Steering committee design, facilitation and effectiveness reviews.
- PMO framework, templates, reporting standards and governance calendar.
- Executive dashboards focused on decisions, risks, actions and readiness.
- Risk, issue, dependency and change governance.
- Vendor and multi-party governance.
- Portfolio governance for multiple implementation initiatives.
- Project profitability and delivery-performance visibility where applicable.
- Governance maturity assessments and corrective-action plans.

Typical deliverables

Deliverable	Purpose
Governance Charter	Decision rights, forums, roles, escalation and meeting architecture.
Executive Dashboard	Status, key decisions, top risks/issues, dependencies, milestones and readiness.
PMO Toolkit	Templates, registers, reporting cadence, meeting packs and repository structure.
Governance Assessment	Maturity scoring, gaps, priorities and improvement roadmap.
Vendor Governance Model	Cross-party responsibilities, escalation, commitments and performance controls.

04

Implementation Delivery Advisory

CoreViaApproach supports the disciplined execution of complex implementations from mobilization through go-live and stabilization. The objective is not to take over the delivery organization but to strengthen planning, coordination, leadership, visibility and execution discipline.

Typical services

- Integrated implementation planning and milestone governance.
- Cross-workstream coordination and dependency management.
- Executive and project-level issue resolution.
- Scope and change-control discipline.
- Project Director-as-a-Service for critical initiatives.
- Client-provider delivery alignment.
- UAT, training and deployment governance.
- Cutover planning, command-center governance and go/no-go support.
- Post-go-live risk management, stabilization and closure.
- Recovery support for delayed or unstable delivery.

Project Director-as-a-Service

For organizations requiring senior delivery leadership without creating a permanent role, CoreViaApproach can provide Project Director support focused on executive coordination, delivery discipline, escalation, stakeholder alignment and implementation outcomes.

05

Project Quality Assurance & Quality Control

Quality must be built into the implementation lifecycle. CoreViaApproach combines preventive Quality Assurance with targeted Quality Control so that gaps are identified while corrective action can still influence the outcome.

Discipline	Focus	Core Question
Quality Assurance	Methodology compliance	Are agreed implementation methods, governance and controls being applied effectively?
Quality Assurance	Process assurance	Are critical processes designed to prevent quality failure?
Quality Control	Deliverable validation	Do key deliverables meet defined acceptance and completeness criteria?
Quality Control	Testing governance	Is evidence sufficient to support confidence in solution readiness?
Quality Control	Go-live readiness	Are business, technology, data, operational and support conditions ready?
Independent assurance	Quality gates	Is there objective evidence to proceed to the next critical stage?

Typical deliverables

- Weighted QC checklist and scoring model.
- Project QA plan and assurance calendar.
- Quality review report.
- Testing governance checklist.
- Go-live readiness assessment.
- Executive quality dashboard.
- Corrective and preventive action register.

06

Project Audit & Recovery

When an implementation is delayed, unstable, disputed or lacking executive confidence, CoreViaApproach provides an independent assessment focused on facts, root causes and practical recovery priorities.

Audit scope may include

- Governance and executive sponsorship.
- Scope, planning and delivery performance.
- Business and technology alignment.
- Vendor and stakeholder management.
- Quality and testing.
- Data migration and reconciliation.
- Risk, issues, dependencies and change.
- Readiness, cutover and post-go-live stability.
- Methodology, documentation and accountability.

Recovery outputs

Output	Value
Executive Health Assessment	Independent view of current implementation health and confidence.
Root-Cause Analysis	Distinguish symptoms from structural causes.
Recovery Roadmap	Prioritized actions, owners, sequence and decision points.
90-Day Stabilization Plan	Focused governance and execution plan for urgent recovery.
Management Review Pack	Decision-oriented summary for sponsors and steering committees.

07

Data Excellence

Data migration is a business-critical implementation discipline. CoreViaApproach helps organizations create trusted data through stronger migration governance, cleansing strategy, reconciliation, repeated mock cycles and controlled cutover.

Data Migration Strategy

- Migration scope, principles, ownership and governance.
- Source-to-target mapping governance.
- Mock migration strategy and cycle objectives.
- Reconciliation framework and acceptance thresholds.
- Cutover sequencing, timing and decision criteria.
- Data issue escalation and business ownership.

Data Cleansing Strategy

- Data quality assessment and prioritization.
- Cleansing ownership between business and technology.
- Rules, remediation workflow and evidence.
- Exception management and residual-risk acceptance.
- Progress reporting and readiness criteria.

A successful go-live requires trusted data, not simply migrated data.

08

AI-Enabled Advisory

CoreViaApproach uses AI as an enabler of stronger advisory work, project intelligence and productivity. AI does not replace executive judgment, professional accountability or implementation experience.

Practical applications

- Executive summaries and decision-oriented reporting.
- Risk and issue pattern analysis.
- Trend identification across project data.
- Meeting, decision and action traceability.
- Document and deliverable review support.
- Knowledge management and lessons-learned reuse.
- PMO productivity support.
- Project health insights and early-warning indicators.

Governance principles

- Human review remains mandatory for advisory conclusions.
- Client confidentiality and information-security requirements apply.
- AI-generated content is verified before external use.
- Use cases should be proportionate to business value and risk.
- AI should simplify decision-making, not add another layer of complexity.

09

Leadership & Capability Development

Sustainable implementation capability requires more than templates. CoreViaApproach provides practical training and coaching based on real implementation situations, governance decisions and delivery challenges.

Programs

Program	Focus
Project Manager & PMO Leadership	Practical governance, planning, risk, reporting, escalation and stakeholder leadership.
Project Team Implementation Workshop	Five-day practical program for project teams covering lifecycle discipline, collaboration, risk, quality and delivery.
Steering Committee Governance	Executive roles, decision-making, escalation and governance effectiveness.
Data Migration Workshop	Migration strategy, controls, reconciliation, mock cycles and cutover.
Quality Assurance Workshop	QA/QC principles, project health, quality gates and readiness.
AI for Project Management	Responsible AI use for analysis, reporting, knowledge and project intelligence.
Train-the-Trainers	Build internal capability to reuse approved methods, templates and practices.

Training approach

- Practical workshops.
- Real implementation scenarios.
- Templates and toolkits.
- Executive-oriented sessions.
- Exercises designed to produce reusable outputs.

10

Post-Merger & Acquisition Integration Advisory

CoreViaApproach supports organizations after a merger or acquisition, when strategic transaction objectives must be translated into operational integration. The service focuses on implementation — not valuation, due diligence or transaction execution.

Typical advisory scope

- Post-merger integration governance and integration roadmap.
- Integration Management Office (IMO) structure and governance.
- Business and technology integration planning.
- Core banking, insurance, payments, digital and enterprise platform consolidation.
- Data migration, cleansing, reconciliation and consolidation governance.
- Business-process and operating-model alignment.
- Application and system rationalization governance.
- Multi-vendor and multi-stakeholder coordination.
- Integration risk, dependency, issue and change management.
- Executive integration dashboards and decision support.
- Cutover and operational readiness governance.
- Post-integration stabilization and performance monitoring.

From transaction completion to controlled operational integration.

Digitalization & Digitization Advisory

CoreViaApproach separates digitalization from digitization and keeps both anchored in implementation reality.

Digitalization Strategy

Digitalization addresses how technology changes operating models, customer journeys, processes and service delivery. CoreViaApproach can help define implementation-oriented roadmaps, governance, priorities and delivery sequencing.

- Digital implementation roadmap.
- Operating-model and process modernization.
- Customer journey implementation priorities.
- Automation and AI adoption governance.
- Digital governance and benefit tracking.

Digitization Strategy

Digitization addresses the conversion of manual or paper-based activities into digital workflows and controlled electronic processes.

- Workflow digitization.
- Paperless-process roadmap.
- Digital onboarding implementation planning.
- Electronic approvals and BPM governance.
- Process automation advisory.

These services are positioned as implementation-oriented advisory, not as software development or platform delivery.

Quality Management & Controls

CoreViaApproach helps banks and financial institutions strengthen the quality and control environment of day-to-day operations. This service is independent from project implementation and focuses on recurring operational weaknesses, control effectiveness, evidence, corrective actions, management visibility and continuous improvement.

Typical situations

- Recurring operational errors or repeated findings.
- Procedures that are outdated, inconsistent or not followed in practice.
- Controls that exist but are weak, duplicated or insufficiently evidenced.
- Overdue corrective actions, recurring incidents or ineffective remediation.
- Customer-service, SLA or operational-quality deterioration.
- Limited management visibility over quality performance and control effectiveness.

CoreViaApproach response

- Quality Management & Controls Health Check.
- Process and control assessment.
- Quality Control Matrix and control-effectiveness review.
- Findings, root-cause analysis and CAPA management.
- Quality KPI/KRI monitoring and management dashboards.
- Periodic quality reviews and management review packs.
- Continuous-improvement register and roadmap.

The service is practical and evidence-based. ISO implementation or certification is not included in the current CoreViaApproach QMC scope.

PMO-as-a-Service & Project Director-as-a-Service

Some organizations need implementation leadership capability quickly without building a permanent structure. CoreViaApproach can provide managed governance and senior delivery leadership through defined service models.

Offer	Scope
PMO-as-a-Service	Governance setup, reporting, risk/issue/change registers, steering packs, coordination, portfolio visibility and continuous methodology improvement.
Project Director-as-a-Service	Senior implementation leadership, executive stakeholder management, delivery alignment, escalation, critical decision support and project recovery.
Governance Office Setup	Design and launch of a client-owned PMO/implementation office, including templates, routines and transition to internal ownership.
Temporary Transformation Support	Time-bound leadership for mobilization, recovery, cutover or stabilization periods.

Transition principle

Where CoreViaApproach temporarily operates a governance or leadership function, the engagement should include knowledge transfer, documented methods and a clear transition model so the client retains sustainable capability.

Engagement Models

Clients can engage CoreViaApproach at different depths depending on risk, maturity, urgency and internal capability.

Engagement Model	Best Used When
Executive Advisory	Independent support to sponsors and senior management on governance, priorities, risk, decisions and implementation confidence.
Implementation Advisory	Ongoing advisory across governance, delivery, quality, data, readiness and stakeholder alignment.
Independent Assurance	Targeted health checks, audits, quality reviews and readiness assessments.
Project Recovery	Rapid assessment followed by stabilization and prioritized recovery action.
Specialist Advisory	Focused support for data migration, cutover, QA/QC, PMO, digitalization, post-M&A integration, Quality Management & Controls or other critical disciplines.
Capability Development	Training, coaching, templates and methodology transfer.

The engagement adapts to the implementation. The principles do not.

Value for Financial Services Organizations

For banks, insurers and other financial-services organizations, the portfolio is designed to protect business objectives while improving implementation control, readiness and executive confidence.

Need	CoreViaApproach Response	Expected Value
Governance	Clear ownership, escalation and decision rights.	Faster decisions and stronger accountability.
Delivery	Integrated planning and dependency control.	Improved milestone reliability and issue resolution.
Quality	Independent assurance and readiness gates.	Reduced avoidable implementation and go-live risk.
Data	Migration controls and reconciliation.	Higher confidence in financial and operational data.
Vendor relationship	Balanced, evidence-based governance.	Better collaboration and fewer unresolved ambiguities.
Post-go-live	Stabilization and risk management.	Faster move from launch to controlled operations.
Operational quality	Health checks, control effectiveness, CAPA and quality-performance monitoring.	Stronger controls, clearer accountability and improved management visibility.

Value for Technology Providers

Technology providers succeed when clients are ready, decisions are timely, responsibilities are clear and dependencies are managed. CoreViaApproach can strengthen these conditions without taking over the provider's delivery responsibilities.

- Clearer client governance and escalation.
- Better visibility of client-side dependencies and readiness.
- Faster resolution of cross-party issues.
- Improved alignment on scope, milestones and acceptance criteria.
- Stronger UAT, data, cutover and business-readiness governance.
- Independent facilitation where delivery discussions become difficult.
- Executive reporting that reflects shared implementation reality.
- Support for post-go-live stabilization and project closure.

Independent advisory should improve the client-provider relationship, not create another boundary between them.

The CoreViaApproach Delivery Method

Across services, CoreViaApproach uses a consistent six-stage advisory logic. The stages can be applied to an entire implementation or to a focused workstream such as quality, data, governance or post-merger integration.

Stage	Advisory Focus
ASSESS	Understand objectives, scope, governance, delivery status, risks, quality, data, stakeholders and readiness.
ALIGN	Create a shared view of priorities, ownership, decision rights, success criteria and actions.
GOVERN	Establish control, accountability, executive visibility, escalation and disciplined decision-making.
DELIVER	Support execution with practical oversight, coordination, issue resolution and milestone discipline.
ASSURE	Independently assess quality, risk, readiness, data, controls and supporting evidence.
OPTIMIZE	Stabilize operations, capture lessons, strengthen capability and improve future delivery.

ASSESS → ALIGN → GOVERN → DELIVER → ASSURE → OPTIMIZE

Typical Deliverables & Toolkits

CoreViaApproach engagements are designed to leave tangible, reusable assets. Deliverables are tailored to the mandate but may include:

Area	Example Deliverables	Primary Use
Governance	Governance charter, RACI, steering pack, executive dashboard, risk/issue/change registers.	Governance and PMO
Quality	QA plan, weighted QC checklist, health assessment, quality gates, readiness scorecards.	Quality assurance
Data	Migration strategy, cleansing plan, mock-cycle checklist, reconciliation framework, cutover readiness checklist.	Data Excellence
Delivery	Integrated implementation plan, dependency map, cutover plan, stabilization tracker.	Delivery
Audit & Recovery	Health-check report, maturity assessment, recovery roadmap, management review pack.	Recovery
Post-M&A	Integration roadmap, IMO governance, systems/data consolidation plan, integration risk dashboard.	Integration
Capability	Training decks, workshops, practical templates, coaching plans.	Capability Development
Operational Quality	Quality health check, control matrix, findings & CAPA register, KPI/KRI dashboard, quality review report and improvement roadmap.	Quality Management & Controls

Starting an Engagement

CoreViaApproach favors a simple entry point: understand the implementation reality before prescribing a large advisory program.

Typical first steps

- Executive discussion to understand objectives, commitments and current concerns.
- Focused review of governance, delivery, quality, data, readiness and stakeholder environment.
- Identification of the highest-value advisory priorities.
- Agreement on engagement model, scope, expected outcomes and working relationship.
- Mobilization with clear ownership, cadence, deliverables and decision points.

Start with the implementation reality. Build only the advisory support that creates value.

Contact

CoreViaApproach™

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