

## Technology Services through CAMEO's Shared Services Center

<u><b>Project-Based Services</b></u>	<u><b>Project-Based Services</b></u>
<u><b>Technology Assessment</b></u> <ul style="list-style-type: none"> <li>Assessment of software applications and customer experience and written report of assessment</li> </ul>	<u><b>Salesforce Environment Review</b></u> An in-depth review of an organization's existing Salesforce environment, with a list of actionable recommendations following best practices.
<u><b>Cybersecurity Services</b></u> <ul style="list-style-type: none"> <li>Risk assessment and written report; website and network penetration scan; risk treatment and assurance plan</li> <li>General development and assistance with cybersecurity policies and procedures</li> <li>Guidance on fraud prevention and protection</li> <li>Training for staff members via KnowBe4 Platform</li> </ul>	<u><b>Caliper Packaged Deployment (includes CRM, Servicing and Accounting)</b></u> Deploy a <a href="#">fully managed and hosted Caliper BI</a> reporting solution, with an initial subset of integrations built to a data warehouse environment and high priority reports developed. Leverage existing dashboard work done for CAMEO.
<u><b>Loan Management Software Selection</b></u> A structured approach to selecting a new loan management platform, following a standard methodology. Includes requirements definition, identification of 3-5 vendors to consider, agenda-driven demonstrations from vendors, vendor management, negotiating, due diligence, and contracting with preferred vendor.	<u><b>Ongoing Services</b></u>
<u><b>Accounting Software Selection</b></u> A structured approach to selecting a new Accounting platform, following a standard methodology. Includes requirements definition, identification of 3-5 vendors to consider, agenda-driven demonstrations from vendors, vendor management, negotiating, due diligence, and contracting with preferred vendor.	<u><b>New Salesforce Implementation Services (4-6 months)</b></u> For organization's implementing Salesforce for the first time. Project scoping required to provide a refined estimated effort and timeline to implement the desired functionality.
<u><b>Data Warehouse and Reporting Environment</b></u> For organizations with technical report writers on staff, help design and deploy an integrated data warehouse and reporting environment. Organization resources will be the primary report writers, with outsourced technology support providing data services and strategic guidance. Reporting environment will be hosted by the member organization.	<u><b>Salesforce Environment Support (60 hours)</b></u> Provide short-term fractional Salesforce development and/or Admin support for organizations using Salesforce in pre-purchased buckets of hours.
<u><b>Integration Development (between 36-48 hours)</b></u> Development of an integration between common applications (Accounting, Loan Servicing, Loan Origination, CRM)	<u><b>Software Implementation Support Services (3-6 months)</b></u> Provide project management and/or hands-on functional support throughout a software implementation, in coordination with vendor and organization resources.
	<u><b>Strategic Advising</b></u> <ul style="list-style-type: none"> <li>Data governance development/maintenance</li> <li>IT governance, including technology risk evaluation and business continuity planning</li> </ul>
	<u><b>Fractional Salesforce Administration (up to 20 hours/month)</b></u> For organizations with Salesforce who have no/limited support available, provide ~5 hours per week of Admin and Development support.
	<u><b>Group Trainings (On Demand) on Topics Such as:</b></u> <ul style="list-style-type: none"> <li>Getting started with AI for CDFIs</li> <li>CDFI IT Maturity Model</li> <li>State of IT in the CDFI Industry</li> <li>Lending Software Analysis, Selection and Implementation</li> </ul>

**Have questions? Please contact Adriana Williams at [awilliams@cameonetwork.org](mailto:awilliams@cameonetwork.org)**