



STRATEGIC TECHNOLOGY LEADERSHIP SUPPORTING A TRANSFORMATIONAL BANK MERGER



At a Glance

- **Assets:** Sub-\$1B community bank at time of engagement
- **Growth Strategy:** Acquisition-driven, toward a multibillion-dollar regional footprint
- **Engagement:** Merger Integration & Technology Leadership

A community bank pursuing strategic growth through acquisition signed a merger agreement that would meaningfully expand its footprint and advance its goal of becoming a multibillion-dollar regional institution.

The success of the transaction would depend not only on the strategic case for the deal, but on its execution: a core system conversion, treasury integration, and vendor coordination across two institutions, all under close regulatory and investor scrutiny and without disrupting the customers and employees who depend on the bank every day.



Where the Risk Lived

The executive committee had led due diligence effectively. The next challenge was execution.

A full-scale integration needed to move forward alongside the daily work of running the bank, with limited internal bandwidth to manage both and no single leader accountable for where technology, operations, and vendor relationships intersected. The integration touched nearly every part of the institution, including:

- A core banking system conversion between major platform providers
- Treasury and cash management integration
- Vendor coordination across both institutions
- High visibility with regulators and investors

Without dedicated integration leadership, the combination of technical complexity and limited internal capacity represented a significant risk to the transaction.



Bringing in Dedicated Leadership

Rather than divide internal leaders between running the bank and managing the integration, the bank partnered with Hartman Executive Advisors to provide accountable leadership and technology oversight throughout the transaction.

Hartman assembled a team with deep experience in core banking platforms, treasury operations, and large-scale technology integrations - professionals who had managed this type of conversion before rather than generalists learning it on the job. The engagement was structured around execution, with clear ownership for integration outcomes.

Hartman established a governance framework that included weekly cross-functional meetings involving every business line, along with biweekly operational sessions to address integration activities in detail. Responsibilities, deadlines, and milestones were clearly defined and tracked, giving leadership consistent visibility into progress.



Executing the Conversion

Beyond governance, Hartman provided direct oversight of the most complex elements of the integration, including core system compatibility, data migration, vendor coordination, and escalation management. The team ensured technology conversion activities remained aligned with operational timelines and regulatory expectations.

Equally important, Hartman brought an unbiased perspective to the integration. With no stake in a particular platform or vendor, the team could maintain accountability across the effort and focus decisions on the bank's priorities. This allowed internal leaders to remain focused on running the institution while integration activities stayed coordinated and on schedule.

Centralized reporting and documentation ensured executives, investors, and regulators had confidence that the integration was being managed with rigor and transparency.



Outcomes

The merger was completed on schedule with minimal disruption to customers or employees.

Key outcomes included:

- Clean and efficient data migration during the core system conversion
- Strong regulatory positioning throughout the integration process
- Reduced internal strain through structured program leadership

The core provider reported that the data conversion required minimal intervention - an uncommon result for integrations of this scale.

Strategic Impact

Beyond the successful transaction, Hartman's leadership helped establish a repeatable integration framework, documented governance processes, and greater internal confidence in executing future acquisitions - strengthening the bank's ability to pursue its long-term growth strategy.