

From The Corner Office

Greetings and welcome to the latest installment of The Iron Chronicles! Last summer we kicked off a trip down memory lane as part of a countdown toward Enterprise Iron's 20th Anniversary. We invited you, our readers, to follow along as we discussed our founding, our namesake (need a hint? Think "Big Iron") and continued to share stories, insights, and industry news from our team members. It's hard to believe that as we write this, we are now less than one month away from celebrating that milestone and we are humbled, having so much to reflect on and be appreciative for. We wouldn't be Enterprise Iron without every single client, team member, partner, family member, friend, and supporter who has been involved with the company in one way or another during our tenure.

We have so much to be grateful for and appreciate every person, experience, challenge, and accomplishment we've encountered during this journey. So much has changed in the world, with us, and in our industry during the two decades we've been in business. EI is expanding our team to incorporate more diverse skills and expertise, enabling us to increase the value we bring to our work by offering a wider range of knowledge and experiences. We are evolving our suite of Solutions, from Managed Services to Modernization, and opening new doors via our growing list of contract vehicles to deliver our services to local, state, and federal government agencies in addition to the long list of public and private firms we have always served.

The pandemic changed the business landscape on a global scale and made lasting impressions that we, as a society, continue to reconcile. Tremendous hardships were experienced by far too many and although struggles remain, we hold firm that togetherness and hard work can accomplish great things. In a world that is increasingly complex, we believe it is critical to be a continuous learner, seeking out new ways of thinking to solve problems and make improvements not only in business, but for the betterment of our community.

New Jersey remains our homebase, but our growing arsenal of team members and clients are spread across the United States, Canada, and Puerto Rico. Prior to the pandemic, EI had extensive experience with remote work through a small home office and employees serving clients from 31 states and Puerto Rico. Today, we continue this work seamlessly and efficiently. The world has witnessed how increasingly important it is to have teams and technologies that you can depend on – and our **Workforce Solutions** empower clients to do just that. Our team can integrate with yours seamlessly to optimize and streamline your business or technology processes.

We understand the complexities of our highly-regulated industry and know that certain mission critical skills have become increasingly difficult to source. However, we excel at deploying EI consultants in key roles and skills such as: plan document and compliance testing analysts, cloud engineers, business and technical analysts, program / project managers, and QC testers across various platforms and ecosystems to augment any project team, evident from our proven track record of results. If your business is looking to make improvements or changes, know that Enterprise Iron provides the flexibility, cost-savings, speed, and expert acumen that is essential to achieve your goals. We are here to help however we can – quality and customer satisfaction are our top priorities!

Allow us to repeat what we wrote last year because it remains true, "As a small (but mighty) business, we are immensely proud of what we've achieved to date and are excited for what lies ahead." Cheers to the next twenty years and thank you again for being a part of this ride. We hope you and your families have a wonderful summer season!

Thank you,
John Crocker & John Polito
Co-Founders

Partnering for the Next Twenty Years

By Tim Scott, SVP of Business Development

Enterprise Iron has a long history of creating partnerships with firms that bring value to our customers. Typically, these partnerships offer specific technology enablers or skillsets that are not a part of our core team's capabilities. We are very selective about our partners to ensure the quality and efficacy of services as we uphold the high standards that our clients expect from us. Those expectations include the extension of our credibility to those partners.

As we look forward to our twentieth anniversary, we want to introduce our readers to some of our most valuable partnerships. These firms have been vetted and have proven business models that mesh with EI's values and operating model and perform services that are of great value to our clients. In most cases, we are not only sales and marketing partners, but are also involved in the implementation of their solutions.

What follows are high-level overviews of these firms, and we encourage you to reach out to us to learn more about how EI can leverage these partnerships for the betterment of your business.

UPCOMING EVENTS

Enterprise Iron's BBQ & Wine Bottling Party

Saturday, June 25th

We are excited to once again host this annual event for our employees, clients, family, and friends after a couple of years off due to the pandemic. It is sure to be a very special day as we celebrate our 20th Anniversary!

NASRA Annual Conference

August 6th - 10th

Be sure to connect with Tim Scott & Ishu Chhabra!

NAGDCA Annual Conference

September 18th - 21st

We're a sponsor!

BizNuvo[®] is a new disruptive technology that empowers organizations with a zero-code platform enabling clients to create and manage self-service capabilities without the need for large technology teams or capabilities. It includes visual design tools, a business rules engine, drag and drop workflows, databases, and APIs to allow you to deliver applications more efficiently than with other tools. Clients typically start with one application and then quickly see the applicability to many other areas in their ecosystem. In many cases, BizNuvo[®] can reduce the number of applications significantly.

ResQSoft[®] is a software tools and technology company that specializes in writing high-quality program source code with automation for modernizing old software and writing new applications. Engineer[™] builds out approximately 85% of the code completion, creates unit test cases, and documents the code. The Low Code tool can also create and maintain new systems. Unlike other vendors, there is no requirement for vendor lock-in or proprietary API for an ongoing license – full source code is delivered with no strings attached.

LinkActiv[®] is a Puerto Rico-based firm that specializes in providing Contact Center services to prominent multinational corporations. They provide 24/7 service with dedicated, certified representatives who can meet customer needs with the proper solution delivered in a nearshore model. These services are often provided at a savings of 25% or more over mainland domestic costs while bypassing some of the typical challenges associated with offshore service centers. Bi-lingual services are available. For clients in the highly regulated Financial Services industry, EI provides deep domain expertise, Subject Matter Experts, training, and ongoing support to ensure a successful experience for your end clients.

Coherent[®] is a technology company that seeks to improve efficiencies in financial services firms, focusing primarily on insurance and retirement through their core platform Coherent Spark, which is a powerful logic engine that converts complex logic from spreadsheets used in companies around the globe into API services to allow for

seamless integration between front and back-end systems. As a platform-agnostic lowcode platform, Coherent Spark brings an efficient platform for integration. Business users and Subject Matter Experts can increase productivity with only a few hours of training on this intuitive platform.

WTax is a world leader in technology-supported tax withholding recovery services to respond to the struggle for efficient recovery of cross-border investment income withholding tax. Asset owners and asset managers around the globe face the ever-evolving operational challenge of reclaiming foreign withholding tax. Consistent tax leakages cause a material drag not only on investment performance, but also on resources from the effort to overcome the challenges when trying to reclaim taxes.

Enterprise Iron is proud of the additional capabilities that we can offer our clients by leveraging these partnerships. Our suite of impactful Business, Technology, and Workforce Solutions continue to deliver results and as business challenges evolve over our next 20 years, we will continue to search for new partnerships that bring value to our clients. To discuss how we can help meet your business needs or objectives, send us an email today – *we're looking forward to speaking with you!*



El actively participates in our industry to stay informed on the latest trends, increase our knowledge base, cultivate key relationships, and connect with peers. This Spring, our team attended events hosted by The SPARK Institute, NASRA, NAPA, PSCA, and PRISM. It was great returning to the in-person meeting format after engaging in several virtual conferences due to the pandemic. A lot of valuable information was discussed, and we had a wonderful time re-connecting with our industry friends!

CASE STUDIES

Retirement Plan Market MVO

A Defined Contribution recordkeeper engaged EI to conduct an independent and unbiased mid-to-large plan market Minimum Viable Offering assessment. Our SMEs delivered observations and recommendations helping the firm bridge gaps, move upmarket, and scale with confidence.

Read the full case study:

www.enterpriseiron.com/case-study-retirement-plan-market-mvo

Genesys Optimization

Our client sought our Contact Center services to combat personnel and geographic limitations, increase call volume, resolve routing issues, and meet demand for agents in a pandemic. Our client enhanced their Call Center Technology, hired our seasoned Technical SMEs to deliver Genesys applications, and now have a trusted provider of Support Security Infrastructure.

Read the full case study:

www.enterpriseiron.com/case-study-genesys-optimization

Platform Conversion

A large Recordkeeping firm needed to convert their largest clients to new services delivered via a new platform, but lacked the resources and expertise to complete the project. We provided retirement business and technical resources to define requirements, integrate the platform, and install new functionality with white-glove service.

Read the full case study:

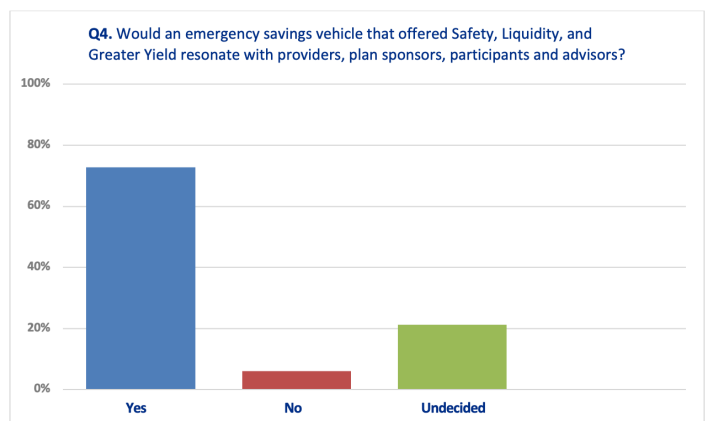
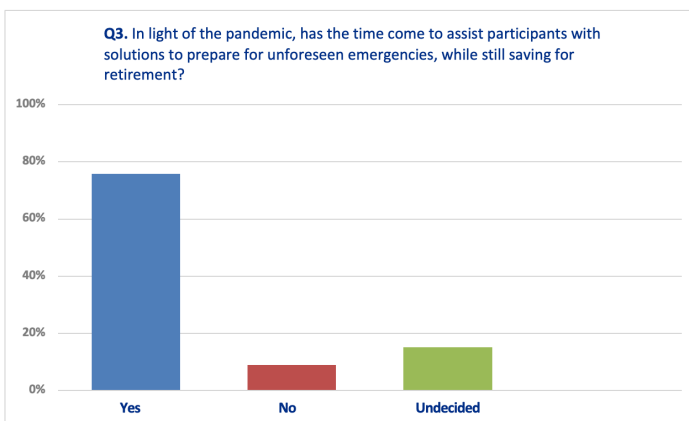
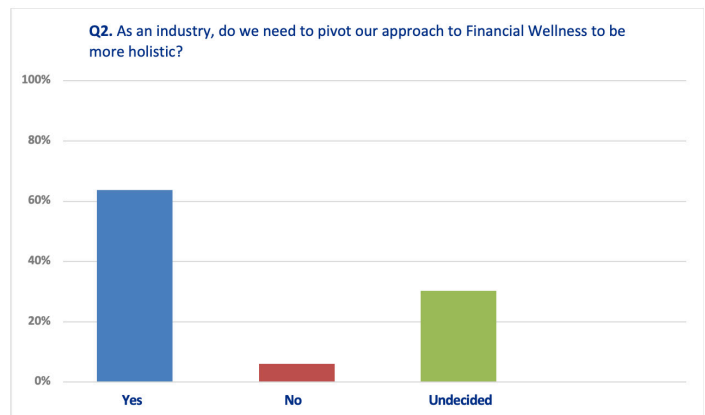
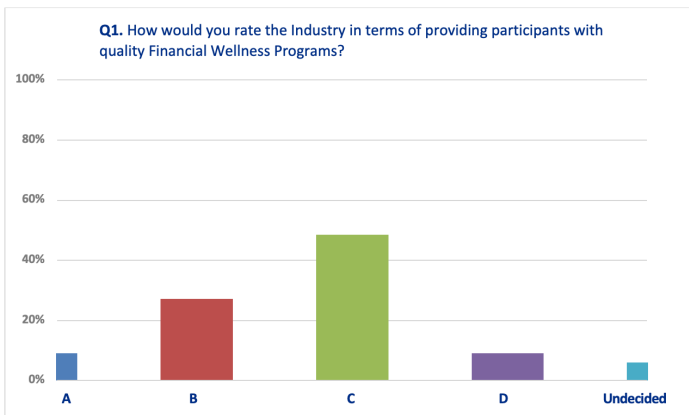
www.enterpriseiron.com/case-study-platform-conversion

Financial Wellness Survey Results

In the January issue of *The Iron Chronicles*, we featured an article on Financial Wellness and asked our readers to respond to a brief survey. As promised, we are happy to share the results below. Thanks again to all who participated!

Key Takeaways:

- Only 36% of respondents gave the industry a "B" rating or better
- Nearly 65% of respondents said the industry must do better
- An astonishing 76% of respondents felt that preparation for unforeseen emergencies was elevated as a result of the pandemic
- 73% of respondents are interested in an "emergency savings vehicle" that offers highly competitive rates, safety, and liquidity



Bring Enterprise Iron into your organization to perform a healthcheck on your current program! Our team of experts will conduct a **Financial Wellness Assessment**, identify improvement opportunities, and make recommendations to enhance your offering including viable emergency savings vehicle solutions available in the marketplace.

Contact Denise Gumlak for more information: dgumlak@enterpriseiron.com