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CASE STUDY

# Farmers & Merchants Bank

## How aligning core and managed IT services created a more seamless, stable operating environment.

When Farmers & Merchants Bank began evaluating its technology future, Chief Information Officer Tyler Morgan was focused on one priority: alignment. The bank already had a strong managed IT services relationship and was pleased with the level of service it was receiving. As leadership made the decision to move its core to Navanta (formerly UFS), the question became how to bring those relationships together in a way that made operational sense.

Morgan clarified that the decision was driven by continuity rather than dissatisfaction. The bank wanted its core and managed IT services working in concert, supported by a single partner that understood both sides of the environment. Like many banks navigating multi-vendor projects, this is often a turning point in rethinking how technology should be managed.

"We wanted continuity between our managed IT services and our core," Morgan explains.

> "Our board told us they were virtually unaware that a conversion had taken place."
>
> **Tyler Morgan**
> CIO, Farmers & Merchants Bank
> $2B in Assets

### A Transition Designed to Minimize Disruption

That alignment became especially important during the transition from their core provider to Navanta's core solution. Leadership paid close attention to how the change would be experienced internally and externally, knowing that even well-planned conversions can create disruption.

The outcome was quieter than expected.

Morgan reports that there were no customer complaints and no negative feedback, even from family members who tend to notice when something changes. As expected with any major transition, there were adjustments to be made, but Navanta addressed all issues quickly and stayed engaged until resolutions were in place.

What stood out following the conversion was how well managed IT services continued to perform under Navanta. Morgan describes the relationship as highly responsive and collaborative, with most issues handled through direct communication with their relationship managers rather than ticket queues or layers of escalation.

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## A Partnership Built on Transparency, Responsiveness, and Stability

That experience reinforced the bank's decision to consolidate the relationship.

Today, Farmers & Merchants Bank is selectively expanding its use of Navanta services. The bank has implemented Communicator Open to support digital banking integration and is evaluating customer engagement capabilities through Navanta's CRM solution. Morgan sees Navanta as an enabling partner in these efforts, particularly in coordinating with their core provider and managing licensing and escalation.

Beyond technology, Morgan points to transparency and stability as tangible benefits. Billing is clear, escalation is faster, and system stability through the transition has been stronger than with prior providers. For Farmers & Merchants Bank, the Navanta partnership provides confidence, continuity, and a technology foundation aligned with how the bank wants to operate.

> "If you are truly looking for a partnership and not just a vendor, pursue Navanta."
>
> **Tyler Morgan**
> CIO, Farmers & Merchants Bank
> $2B in Assets

# About Navanta

Navanta is the trusted technology and services partner for community financial institutions, unifying critical systems, security, cloud infrastructure, and support into one seamless, purpose-built experience. With more than 35 years of banking expertise and a deep belief in the community banking mission, Navanta delivers solutions with heart, soul, and extraordinary service. From managed IT featuring Bankers Private Cloud® to core banking, cybersecurity, advisory, and CRM, Navanta helps institutions simplify complexity, reduce risk, and strengthen daily operations. Navanta empowers community bankers and their people to thrive together. **Go Bankers, Go.™**