

ForwardLine Financial CA, CTO

What state are your headquarters located in: CA

Total annual spend for IT and cybersecurity development measures for your company: 1200000

What state are you located in: CA

What country are you located in:

Industry Sector: Banking / Finance

What are key products or services offered by your company? Lending, loans, line of credit

How many people are employed by your company? 50- 100 employees

What is the current annual revenue for your organization? \$50M-\$100M

How many business locations do you maintain company hardware and equipment such as servers...? 2

How many people are in your IT Department? 5

How many people are on your IT security team? 0

Number of Contact Center Seats: 65

What is your current Operating System? Windows, OSX

Who is your current ERP vendor? SHI

Who is your Cloud Service Provider? AWS

1) Do you have responsibility for Cybersecurity? yes

Do you plan to add or expand cybersecurity initiatives in the next 12 months? yes

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: Application Security - Vulnerability Assessment, Application Security and WAF, API Security, Cloud Security, Security Awareness, Computer-Based Training for end-users, Data Loss Protection, Disaster / Backup Recovery, Endpoint prevention, Identity Access Management, Multi-factor authentication, Penetration Testing and Simulation, Phishing, SIEM,

Please summarize your top Cybersecurity challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): pentest_x000D_sso_x000D_email

2) Do you have responsibility for Cloud software solutions? yes

Do you plan to add or expand cloud solution initiatives in the next 12 months? no

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: ,

Please summarize your top Cloud Solutions challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): no plans

3) Do you have responsibility for Digital Solutions?: yes

Do you plan to add or expand digital responsibility initiatives in the next 12 months?: yes

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: Artificial Intelligence, Machine Learning, Digital Transformation, Robotic Process Automation (RPA),



Please summarize your top Digital Solutions challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): more automation in the lending process

4) Do you have responsibility for Data Management? yes

Do you plan to add or expand data management initiatives in the next 12 months? yes

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: ,BI Dashboard Reporting,Big Data Analytics,Business Intelligence,Business Process ManagementData Cleansing,Data Warehousing,

Please summarize your top Data Management challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): syncing data from sources to our dw in snowflake

5) Do you have responsibility for Software/Application Development and Management? yes

Do you plan to add or expand software / application development initiatives in the next 12 months? no

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: ,

Please summarize your top Software/ Application Development challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): no plans

6) Do you have responsibility for Communication Systems? yes

Do you plan to add or expand communication system initiatives in the next 12 months? no

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: ,

Please summarize your top Communication Systems challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): no plans

7) Do you have responsibility for Network Systems? yes

Do you plan to add or expand network system initiatives in the next 12 months? no

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: ,

Please summarize your top Network Systems challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): no plans

8) Do you have responsibility for Consulting / Outsourcing? yes

Do you plan to add or expand consulting / outsourcing initiatives in the next 12 months? yes

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: ,Call Centers,Software / Application Development,Staffing / Recruiting

Please summarize your top Consulting/Outsourcing challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): expanding, remote support

9) Do you have responsibility for IT Leadership, Talent Management and Training? yes

Do you plan to add or expand IT leadership, talent management, and training initiatives in the next 12 months? yes

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: Leadership coaching

Please summarize your top IT Leadership, Talent Management and Training challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): team development

