

## Managing Technology Risks For Families

We have a proven track record in designing, implementing and supporting complex IT systems for Family enterprises, but it is Family Enterprise Risk Management that sets us apart.

We begin by gaining a thorough understanding of a Family's business activities and practices through a process of discovery. Successful technology risk management comes through focussing on users, business processes and systems. This discovery phase is an opportunity for the client to share their vision and objectives with us and for us to understand how the people and technology currently serve the needs of the business. Only when it helps the family to gauge whether the objectives are shared and understood between all members is our work worthwhile. This is critical to achieve and maintain profitability.

We help to ascertain whether the people have the necessary skill and will to use the technology to serve the business's needs. In our experience skill and will gaps relative to what is required is one of the largest risks a business can face. We also review business process to identify risks, such as for example non-conformity to industry best practice, untested backup processes, unverified business continuity plans.

We determine whether the vision and objectives have been successfully translated into technical solutions and whether they are fit for purpose and future proof. The results of this discovery process serve the family with a clear picture of the risks they face. This understanding allows them to confidently take decisions to mitigate them.

Following the discovery phase we can define, design and deliver vendor agnostic IT systems that serve the business needs and the family's vision. We stay engaged through the crucial stages of testing, training and deployment.

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*Established in 2002, The Termes Partnership is an independent firm exclusively serving family offices and family-owned businesses both large and medium-sized. We are not an asset manager or an intermediary for any financial services providers, all of whom we keep at arm's length. Our partners' expertise covers a wide range of crucial business functions required for the successful and effective deployment of family business & investment assets, including business strategy & governance, capital structure & project finance consulting, strategic asset allocation advice and technology consulting.*



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## Discovery

- Business process and rules
- Systems and Application Inventory
- Risk review – classifying the risks
- Architecture review and validation

## Design

- Matching Business objectives with Technology solutions
- Bespoke, client focussed architecture design
- Vendor agnostic, business benefit driven design

## Implementation

- Vendor certified technical expertise
- Multisite global implementation capabilities
- Coordination and management of 3rd parties

## Support

- Full lifecycle Project Management
- Direct user support and 3rd party support contract management
- Continual platform update cycle
- Regular review ensuring alignment of business goals and technology capability

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