

# Heritage Oaks Bank Leverages RLR Management Consulting for Online Banking Platform Evaluation and Selection

**PALM DESERT, CA** - [RLR Management Consulting](#) (RLR), the industry's longest tenured privately-owned consulting firm for commercial banks, announced the completion of its online banking platform evaluation and selection project for Paso Robles, Calif.-based [Heritage Oaks Bank](#) (\$1.9 billion in assets and 12 locations).

Through the engagement, RLR met with Heritage Oaks Bank to define internet banking requirements, identify appropriate vendors based on the specific needs of the bank and manage the RFP evaluation process. After narrowing the field of vendors, RLR developed a financial cost-benefits analysis of each system and, upon completion, selected [Q2 Holdings, Inc.](#) and its Q2Platform, while also assisting with contract negotiations between Heritage Oaks and Q2.

"RLR has assisted us with several key initiatives by providing project management services as well as subject matter expertise," said Simone Lagomarsino, CEO of Heritage Oaks Bank. "They have often helped us identify more efficient and cost-effective solutions to difficult issues. By using RLR to manage projects or consult on other operational efforts, we have also been able to free up some of our management staff to work on other priorities."

In addition to the online banking platform evaluation project, Heritage Oaks selected RLR in 2015 to manage key components of its enterprise data warehouse implementation during a brief restructuring phase. In this role, RLR facilitated the ongoing knowledge transfer between employees and management teams, assisted staff in developing policies and procedures, defined roles and responsibilities for data warehouse support and developed documentation for data validation and governance. In 2014, Heritage Oaks turned to RLR to lead its in-market acquisition, which required the migration of data between both financial institutions, as well as the integration of 17 combined locations and, ultimately, consolidation to 12 locations.

"The development of multiple engagements, especially in a competitive and changing environment, requires strong organizational focus and a collaborative effort to ensure the success of each project from start to finish," said Ruth Razook, founder and CEO of RLR Management Consulting. "Heritage Oaks Bank exemplifies that resolve. Its leadership clearly understands the importance of embracing strategic initiatives that add greater competencies and secure a foundation for future growth and success."

**About Heritage Oaks Bank**

Heritage Oaks Bank is the leading community bank headquartered on California's Central Coast. There are Heritage Oaks Bank full service banking branches and a loan production office from Paso Robles to Oxnard. For more information, visit [www.HeritageOaksBank.com](http://www.HeritageOaksBank.com).

**About RLR Management Consulting**

With offices in Palm Desert, Calif. and Reno, Nev., RLR Management Consulting (RLR) is the industry's longest tenured privately-owned consulting firm servicing community banks nationwide in four primary categories: Technology, Regulations/Compliance, Operations and M&A. A trusted consultancy and business advisor since 1988, RLR's clientele includes community and regional banks of all sizes. For more information, visit [www.rlrmgmt.com](http://www.rlrmgmt.com) and follow the company on [LinkedIn](#) and [Twitter](#).