



# \$2.2 Billion in Value Delivered to Financial Institutions

## Complexity, Competition, and Convergence

Financial services is a complex, competitive landscape where the convergence of technology and the ever-changing expectations of individuals and businesses is creating an environment where survival of the fittest is the operating reality. The future is expected to feature more of the same, causing many executives to partner with firms who excel at applying experience, expertise, and data to understand the best option for their clients.

## Our Mission is to Improve Our Client's Profitability

Strategic Resource Management (SRM) offers a variety of strategic advisory services designed to meet the demanding profit and service improvement goals of financial institutions. As an independent professional services firm, SRM has implemented over \$2.2 billion in cost savings and revenue enhancement for its clients. Our firm combines deep industry subject matter expertise in financial services with more than 25 years of experience working alongside banks and credit unions.

## Consulting Services

Our consulting services are built on the unparalleled industry knowledge our team has gained working for vendors, financial institutions, financial services organizations, and industry-focused consultancies. Our specialties include situational assessments, peer comparisons, strategy development, gap analyses, program implementation, and measuring bottom line impact. Today, the amount of work we do in areas such as payments, digital banking, and core processing is one indication of the need institutions have for the skills we bring to the table.

## Strategic Sourcing

Financial institutions are increasingly reliant on third party providers to achieve a competitive marketplace advantage. The number of third party options, incredible variety of partner economic models, and rapid pace of market change has made it difficult for financial institutions to profitably develop new products and still meet

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## PRACTICE AREAS

- Business Strategy
- Strategic Sourcing
- Portfolio Optimization

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## MARKET COVERAGE

- Deposits
- Retail Lending
- Payments
- Digital Banking
- Mortgage
- Insurance
- Wealth Management
- Merchant Services
- Artificial Intelligence

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## SERVICES

- Situational Assessments
- Peer Comparisons
- Strategy Development
- Gap Analysis
- Program Implementation
- Bottom Line Impact Measurement

the expectations of customers. SRM has extensive sourcing experience completing hundreds of vendor selections and contract negotiations each year. Our process is non-invasive, completely transparent, and quantifiable. In 90 percent of the cases, we find material savings for our clients using our proprietary benchmarking database, without requiring a replacement of the incumbent vendor.

### **Portfolio Optimization**

Improving portfolio yield while maintaining competitive positioning and regulatory compliance is a non-trivial endeavor for any financial institution. SRM employs a proven spectrum of portfolio optimization services designed to help our clients grow revenue - without suffering unintended consequences. Our experts leverage decades of banking experience to improve portfolio performance.

### **Impartial Analysis**

SRM's deliverable is measurable improvement. We are independent and do not advise or endorse any third party solution providers; therefore our services are performed with the highest level of impartiality. Our firm is respected in the vendor community as we do not restrict communications between institutions and vendors unless a client requests to do so. In fact, our vendor contacts tell us our work often helps expedite the processes associated with vendor and contract management.

### **There are Billions of Ways We can Help You**

The work we have done to help more than 700 institutions add \$2.2 billion dollars of value to their bottom line also identified that there is an acute need for a solution that allows banks and credit unions to track, audit, and benchmark the contracts they have. Combining our data and experience from over 25 years of financial services gives us the ability to deliver a solution that addresses this need. It is a very powerful combination.

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STRATEGIC RESOURCE MANAGEMENT