



srmcorp.com

OVERVIEW

# Expertise, Data, Proven Skills, & Billions of Proof Points.

THERE ARE BILLIONS OF  
REASONS WE SHOULD TALK

**2.2B+**

IMPACT FOR OUR CLIENTS

**700+**

CLIENTS SERVED

**7000+**

PROJECTS COMPLETED TO DATE

# COMPLEXITY, COMPETITION, AND CONVERGENCE

Financial services is a complex, competitive landscape where the convergence of technology and ever-changing customer expectations have created an environment where survival of the fittest is the operating reality. To be successful in this environment, financial institutions need trusted advisors who deliver.

Our team of subject matter experts cover a broad list of critical areas including payments, digital banking, core processing, application of emerging technologies, and M&A. This expertise, combined with our firm’s proprietary benchmark database and proven skills in areas like strategy development and negotiation, give us the ability to repeatedly add value to the bottom line of leading banks and credit unions.

On the following pages you will find descriptions and other information on our four primary practice areas: Cost Savings, Revenue Enhancement, Process Automation, and Strategic Consulting.



PAYMENTS

450 Projects  
\$1.350 Billion



DIGITAL/CORE

65 Projects  
\$50 Million



AUTOMATION/OPERATIONS

50 Projects  
\$35 Million



ACTIVE PROJECTS

70 Projects  
\$60 million

# COST SAVINGS

WE WANT YOU ...  
TO GET WHAT YOU DESERVE

The number of third party options, variety of pricing models, and pace of market change have made selecting the right fit for vendor services challenging at best. SRM's cost reduction offerings – including RFP services, vendor scorecards, contract negotiations, and conversion management – can add millions in value to your bottom line.

Each year SRM unlocks more than \$80 million dollars of value for its clients. Over our history, we have uncovered more than \$2.2 billion in value for banks and credit unions. As the landscape in the industry continues to evolve rapidly, more institutions are engaging to get a free analysis of what our cost saving services can do for their stakeholders.



PRACTICE AREAS

- Cost Reduction
- Revenue Growth
- Process Efficiencies
- Strategic Consulting



AREAS OF EXPERTISE

- Payments
- Digital
- Core
- Automation
- Operations
- Technology



SERVICES

- Cost Benchmarking
- Contract Negotiations
- Conversion Services
- PAU Card Programs
- Revenue Enhancement
- Artificial Intelligence
- Robotic Process Automation
- TAB Contract Management
- PayTech Advisory Services
- Digital Transformation
- M&A Contract Analysis

# REVENUE ENHANCEMENT

## MONEY SELDOM HIDES IN PLAIN SIGHT

87% of financial institutions do not have an enterprise payments strategy. SRM’s revenue enhancement offerings – including payment enterprise mapping and gap analysis, revenue opportunity prioritization, and program management – help banks and credit unions improve their top line and grow their fee income.

As digital networks are extended to include new devices and endpoints bringing new players and ways to pay into the market, competition for consumer payments will increase exponentially. Banks and credit unions will need a clear strategy supported by focused programs designed to meet the specific payment needs of consumers. SRM’s payments pedigree is benefiting many of those institutions today.



COST REDUCTION

- Benchmarking
- RFP Services
- Vendor Scorecards
- Contract Negotiations
- Conversion Management



REVENUE ENHANCEMENT

- Payment Enterprise Mapping
- Revenue Opportunity Prioritization
- Revenue Enhancement Programs



PROCESS AUTOMATION

- Artificial Intelligence
- Robotic Process Automation
- TAB Contract Management Platform



STRATEGIC CONSULTING

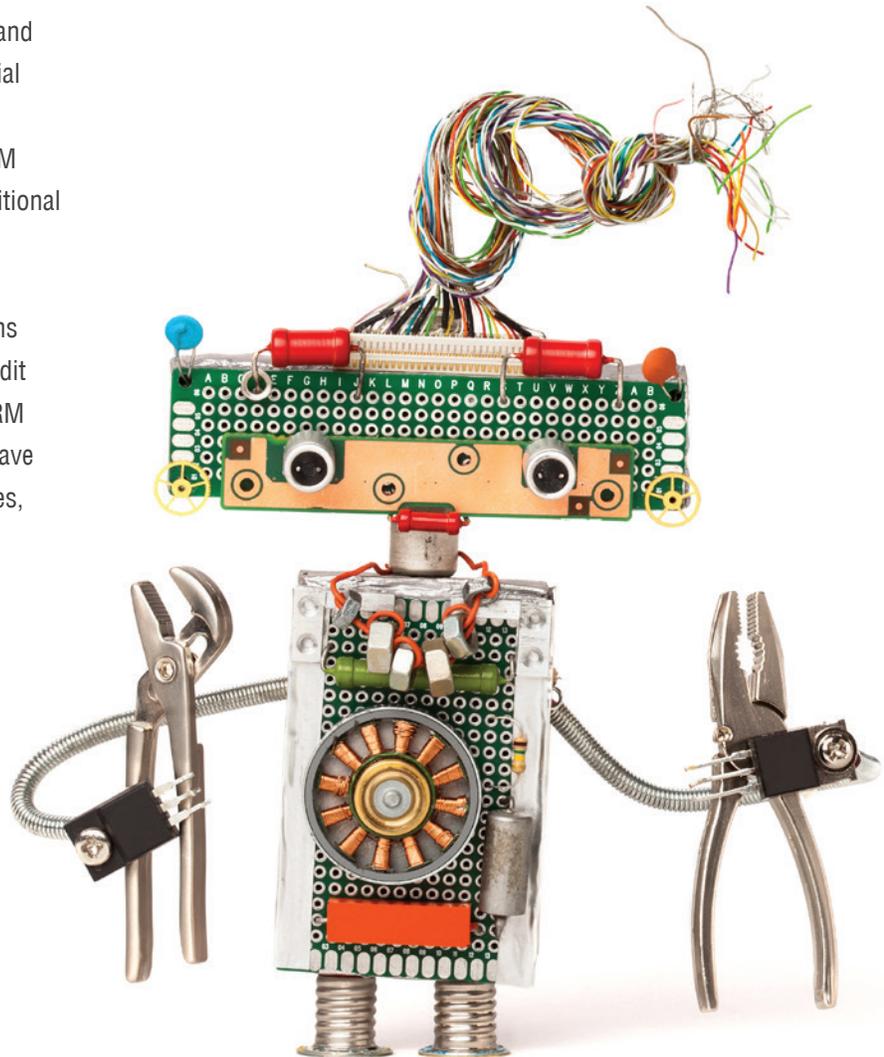
- Payments
- Digital Banking
- Core Processing
- Process Automation
- M&A Contract Analysis

# PROCESS AUTOMATION

## BETTER, FASTER, FOR LESS

Artificial intelligence (AI), robotic process automation (RPA), and software that thinks for itself are making it possible for financial institutions to improve operating efficiencies and customer satisfaction. Using tools that target process inefficiencies, SRM prioritizes and implements these technologies to uncover additional ways to save.

The margin compression common at most financial institutions make process efficiency a top priority for many banks and credit unions. The resulting process efficiencies gained from the SRM engagements that utilize AI, RPA, and enhanced automation have allowed organizations to improve productivity, lower error rates, and improve the top and bottom line.



### PERFORMANCE-BASED

This type of engagement ties our fees to our clients' success.



### FEE-BASED

Some clients prefer a fixed fee based on our efforts performed under a Statement of Work.



### HYBRID

A fixed fee with a negotiation incentive offers a defined scope and performance objectives.

# STRATEGIC ADVISORY SERVICES

## BETTER, FASTER, FOR LESS

SRM's consultants are veterans who have worked for leading brands throughout the industry in areas such as payments, digital banking, core processing, machine automation, and M&A. SRM's consulting offerings include rapid scan evaluations, vision/goal/strategy definition, playbook development, and project implementation.

Too many of the banks and credit unions we encounter believe they are limited in how they can compete with financial institutions in their marketplaces. New technology combined with the subject matter expertise required to develop a strong strategic foundation is changing the competitive landscape, allowing SRM to help its clients compete with anyone they wish.

SRM (Strategic Resource Management) has been selected by more than 700 financial institutions to advise in areas such as payments, digital banking, core processing, and operational efficiencies. The company has unlocked billions of dollars in value and improved the competitive advantage of its clients with a reputation for industry-leading subject matter expertise, a proprietary benchmark database, and proven negotiating skills. Visit [www.srmcorp.com](http://www.srmcorp.com) for more information and follow the company [@SRMCorp](https://twitter.com/SRMCorp).

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