



strategy. delivery. partnership.



*"summusgroup does not pretend to be all things to all people or have all the answers. When they have not had the right resource, they have not taken on the work. That and their ability to seamlessly integrate with our disparate teams and demonstrate value early on is what sets them apart from other advisory firms I've worked with. When they say they are a partner, their actions back it up."*

Technology Executive, Fortune 100 Company

**summusgroup is dynamic** | summusgroup is comprised of individuals with diverse professional backgrounds including:

- Financial Services
- Technology
- Capital Markets
- eCommerce
- Insurance
- Marketing & Marketing Research
- Healthcare and Pharmaceuticals

Our diversity creates an environment that encourages innovation and versatility.

**summusgroup is committed** | Many consulting companies like to make broad promises. At summusgroup, we pride ourselves on aligning the best resources for the individual engagement and client needs. If we can't give you the right resources to meet your needs, we won't take on the initiative.



**summusgroup gets results** | If our clients are successful, then we are successful. A sampling of our results:

**Business Architecture Integration (Fortune 500 Client)**

summusgroup was brought in to integrate two client facing relationship management divisions. This included best practice assessments, technology go forward strategy, sun setting of legacy tools, resource skill and client realignment in an effort to optimize relationships, and the conversion from a product focused model to a client specific model. Additionally, summusgroup outlined a new menu of client facing, revenue generating services previously not offered or even contemplated. The result was a successful integration of two legacy divisions which reduced expense by seven figures annually, grew new revenue by >\$4mm in year one, all while increasing associate satisfaction scores across both teams.

**Compliance and Regulatory (Fortune 100 Client)**

summusgroup successfully implemented enhanced anti-money laundering processes and standards for a large global client. This included building out a new oversight program from the ground up and updating operational procedures to ensure compliance with regulatory standards. In addition, new client onboarding procedures were updated from a process improvement and technology perspective.

**Technology Acquisition and Integration (Fortune 500 Client)**

summusgroup led a program to acquire and integrate a new technology vendor into the core product offering of a client, resulting in a new technology solution offering more robust, payments focused, small business services to financial institutions. This new service complemented the existing suite of products, while integrating new, modern technology within the existing infrastructure and application footprint.

**CRM Implementation (Fortune 100 Client)**

summusgroup led an effort to implement a new Client Relationship Management system across multiple lines of business. This involved all phases of implementation from conversions from existing CRM systems through training of client associates on new best of breed platform.