

Wisemar Overview

A Different Focus

Wisemar provides dynamic solutions for alignment of people, processes, products, and technology. The firm specializes in helping financial services clients through business process improvement, change management, and corporate strategy engagements.

Wisemar was founded based on one simple principle – client satisfaction. While many consulting firms are focused on revenue, quarterly earnings, and meeting expectations of investors, Wisemar’s focus is on the client. And the strategy is simple – meet or exceed client expectations every time. The firm believes if it does a great job, clients will consider it for future needs. As a result, everyone in the company is focused on client satisfaction, and this concept is woven tightly within the entire fabric of the organization.

Capable and Experienced

Wisemar leverages experienced senior consultants with a structured engagement process to deliver consistent positive results for our clients. The depth of experience of the consulting team, and the focus on client satisfaction differentiates Wisemar from other consulting firms. The professionals on the Wisemar team provide a background in multiple disciplines within the financial services industry. A senior consultant’s typical background includes ten to fifteen years in senior management positions at financial institutions, and five to ten years of consulting experience.

Wisemar executives and consultants have worked with the majority of the top 50 US banks, as well as many regional, community, and direct banks. Wisemar has also worked directly with many of the top vendors and partners in the financial services industry. This diverse experience helps provide the framework necessary to deliver innovative best practices to clients to help them improve performance. The combination of business process and strategy alignment is unique and allows the firm to deliver the maximum value to clients.

Project Examples

Wisemar projects typically fall into the following categories for banks and financial service clients:

<i>Business Process Improvement (BPI)</i>	<i>Revenue Enhancement</i>
<i>Cost Reduction</i>	<i>Strategy Alignment</i>
<i>Design & Manage Request for Proposals</i>	<i>Performance Scorecard Design</i>
<i>Mergers, Acquisitions, & Integration</i>	<i>Back Office Operations Automation</i>
<i>Business Case Development</i>	<i>Interim Management Staffing</i>
<i>Change Management Leadership</i>	<i>Project Management</i>
<i>New Product Development & Introduction</i>	<i>Technology Evaluation & Implementation</i>

Wisemar also offers services for vendors and partners in the financial services space including:

<i>Market Assessment</i>	<i>Executive Interviews</i>
<i>New Product Introduction</i>	<i>Strategy Alignment</i>
<i>White Paper Development</i>	<i>Feature and Functionality Review</i>
<i>Implementation and Project Services</i>	<i>Business Process Improvement Integration</i>

Wisemar’s business is focused exclusively within the financial services industry. The unmatched combination of industry knowledge, senior consulting staff talent, and time tested processes for change management provide significant value and recurring annual benefits to our clients.



Configurable Solutions

Wisemar understands that each client has a unique culture, structure, and strategy that differentiate them in the market. As such, each client has unique needs for a successful engagement. Wisemar understands and appreciates these differences and the team has experience delivering successful engagements across a range of projects and clients. Wisemar can help clients leverage their key market values and design change strategies that support and enhance the ability to achieve goals. The Wisemar team has worked with a variety of organizational structures, corporate mandates, line of business owners, matrix accountability, a wide variety of risk tolerances, as well as geography differences. Whether you are a top five bank, or a small community bank, Wisemar has a solution that is unique and configurable for you.

By leveraging Wisemar most banks can accelerate the benefits of potential organizational change by applying dedicated resources. Given the annual recurring benefit of most change, sooner is generally better, and with Wisemar you can arrive at your desired destination on time and with the desired outcomes. By assisting in optimizing your organization, you will be able to drive powerful strategy change and effective cost reduction and revenue enhancement as appropriate.

Long-Term Solutions

Wisemar values the importance of transfer of knowledge at the conclusion of an implementation engagement. A variety of processes, documentation, and training are provided to help streamline a smooth transition from the dedicated Wisemar implementation team to the client's permanent staff. By providing a smooth transition, this allows long-term sustainable change for the client which has resulted in lasting solutions for Wisemar clients.

Financial Service Business Segments Served

Consumer & Home Equity Lending
Mortgage Lending
Retail Bank Delivery
Collection & Recovery Operations

Deposit Services
Small Business Lending
Middle Market Commercial Lending
Insurance

Achieving Results

Leveraging Wisemar's professional experience and knowledge base, Wisemar consultants are able to meet or exceed client expectations as industry subject matter experts, change managers, thought-leaders, and strategic partners.

For most clients, Wisemar utilizes a three-phase approach of assessment, design, and implementation. The first phase is an assessment of the current environment that will validate where the client is performing well, and identify possible areas of improvement. Pending the client's review and approval, Wisemar provides design and implementation services for the desired improvements and strategy. Each step of the process provides solid communication, documentation, and client input. The end result is a fact-based, on-time deliverable.

Wisemar, Inc.
10610 Tavernay Parkway
Charlotte, NC 28262
(704) 503-6008