



REPRESENTATIVE ENGAGEMENT

Business Integration and Consolidation

<p>Client Profile:</p>	<ul style="list-style-type: none"> ■ Top 10 Commercial and Retail Bank - Treasury Management Business Integration Team; largest merger of this type in U.S. banking
<p>Business Issue:</p>	<ul style="list-style-type: none"> ■ 2009 - Current: Led the Event Management function to manage the preparation and ensure readiness across the organization for dozens of customer conversion market events and product releases for the bank's integration of the acquired bank's products and customers. Successfully converted more than 60,000 TM relationships.
<p>Engagement Plan:</p>	<div style="text-align: center; border: 1px solid black; padding: 5px; margin-bottom: 10px;"> PROJECT PHASES / MAJOR ACTIVITIES </div> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid black; padding: 5px; writing-mode: vertical-rl; transform: rotate(180deg);"> PHASE I: Strategy Planning </div> <div style="flex-grow: 1;"> <ul style="list-style-type: none"> ■ Product Review and Gap Analysis ■ Customer Conversion Strategy ■ Customer/Product Database ■ Customer Impact Analysis ■ Integration Project Management Infrastructure </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="border: 1px solid black; padding: 5px; writing-mode: vertical-rl; transform: rotate(180deg);"> PHASE II: Development & Execution </div> <div style="flex-grow: 1;"> <ul style="list-style-type: none"> ■ Product Enhancement Implementation Readiness ■ Conversion Team Program Management ■ Integration Team Project Management ■ Event Readiness ■ Customer Conversion/ Market Support ■ External Communications ■ Event Playbook ■ Contingency Planning ■ Command Center Activities ■ Pre-Conversion Triage ■ Issue Resolution Team ■ Lessons Learned /Success Metrics </div> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px; text-align: center;"> <p>Iterative Improvement: The number of issues per customer declined in each successive event despite increases in customer volume and complexity</p> </div>

INTEGRATION MANAGEMENT STRUCTURE

