

Holland & Davis Financial Services Consulting

Holland & Davis works hand-in-hand with financial services clients who want to create and implement sustainable, profitable change in their business. We focus on what can be done to generate accelerated, recurring profitability and revenue growth.



Highlights

- Created and managed new division in \$13B regional bank that provided full array of banking and investment services to business owners, corporate executives and investors. Division achieved ROE of 30.4% and Profit Margin of 46.8%.
- Developed and implemented new sales management, training, and compensation process that lead to sustained increases in net annual sales by more than 20%.
- Designed and implemented a “best of company - model office” for common approach and processes for delivery of banking and investment services in \$384B national banking institution.
- Created superior customer service culture and process that allowed roll-out of money back service guarantee with positive results both financially and in terms of customer retention.
- Designed and implemented nation-wide, re-pricing project that resulted in \$31M in additional revenue from existing customer relationships.

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★ Increasing profitability through both revenue growth and customer retention

★ Managing successful business change in both regional and national financial services institutions

★ Merging acquired organizations

★ Increasing cross-division sales

★ Growing non-interest income

Transforming Financial Services

- Replicating institution’s unique success formula or “best of company” practices and spreading those practices across the franchise
- Creating and implementing sales and sales management processes that align with corporate goals
- Creating and implementing customer service processes to promote retention of customers and revenue
- Integrating companies so that acquisitions achieve strategic objectives rather than become “missed opportunities”

Our Competitive Edge

- Senior Practitioners doing the hands-on work
- Multi-industry experience, insight, transfer
- Time-tested, results-oriented methodologies
- Integrating people, processes, and technology

If you are interested in a Jump Start Assessment for your organization give us a call today at 713.877.8130.

MANAGEMENT CONSULTING
PROJECT SUPPORT SERVICES



Implementing Change for Business Results . . . On Target, On Time and On Budget.

What Our Clients Say "Holland & Davis gave us invaluable insight into our strategy implementation. Without their help, we would not have had as successful a strategy rollout" —International Pharmaceutical Company

HDI FINANCIAL SERVICES LEADER

Steve Ferguson, PhD, has over 24 years of management experience in the financial services industry working in both regional banks and in banks that are national powerhouses. His work in banking is focused on creating and leading new business units, managing the integration of newly acquired companies, and transforming underperforming divisions.

About Holland & Davis, LLC

Holland & Davis is a 30 year professional services firm founded on the following values:

- Customers Come First
- Customers are the experts in their industries and companies
- Holland & Davis is expert in helping customers improve the performance of their companies to the next level.
 - o Strategy development and implementation
 - o Management of big changes
 - o Transformational leadership
- Working arm-in-arm with the customer is more valuable to customers in the long run than providing a third-party report that might sit on a shelf
- Holland & Davis gets results for and with its customers

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The Company We Keep

AIM Funds Inc.
America Banking Association
American General Life Insurance
American Memorial Life
Bank of America
Bank United
Chase Bank of Texas
Citibank
Compass Bank
C&S/ Sovran Bank
Dean Witter Reynolds, Inc.
E.F. Hutton
Edward Jones
Fireman's Fund Insurance
First City National Bank
Frost National Bank
Jefferson State Bank
Kidder Peabody & Co., Inc.
National Commerce Bank
OmniBanc, N.A.
Prudential Insurance
Ranger Insurance
Rainier Bank
RepublicBank (Bank One)
River Oaks Trust Company
Securities Industry Association
United Services Automobile Association (USAA)
US Savings & Loan League
VALIC
VISA Corporation
Washington Mutual (Bank United)

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