



Carlisle & Gallagher Consulting Group (CG) is a management and technology consulting firm that delivers large-scale, complex technology solutions for the world’s leading financial services organizations. We help our clients solve their most critical business and technology problems, meet tight deadlines, and plan for future challenges in an industry operating under unprecedented change and competitive pressures.

CG has built deep client loyalty and a strong industry reputation by doing the right thing for our clients, employees, and community. We back this simple, but rare philosophy with a team of highly experienced consultants who are committed to delivering rapid results.

Company Facts

- **Founded in 2002**
- **President and CEO: Bob Gallagher**
- **Headquartered in Charlotte, NC**
- **Financial services industry focus**
- **Privately-held firm with an average 35% CAGR**
- **Consultants average 10 years of financial services experience**

Focus on Financial Services

CG has a unique understanding of the financial services industry. We provide clients with a powerful combination of deep institutional knowledge, hands-on consulting experience, and proven delivery excellence in key areas of their business, including:

Deposits & Core Banking
 Payments & Card Services
 Consumer Lending & Mortgage

Treasury Services/
 Cash Management
 Commercial Lending
 Investment Banking/
 Capital Markets

Brokerage
 Retirement Services
 Insurance Services

Channels
 Marketing & Customer Experience
 Operational & Credit Risk
 Sales & Service



Our Services

Our Management & Technology Consulting, Delivery, and Program & Project Management services help you meet your business, technology, and operational goals from concept to delivery. You will benefit from accelerated development of products and services, compliance with new regulations, lower costs, and better alignment of your business and technology investments.

Management & Technology Consulting

- Strategic Portfolio Planning
- Business & Technology Architecture
- Business Intelligence & Data Management
- M&A Planning & Integration
- Optimization & Cost Efficiency
- Marketing & Customer Experience
- Process Improvement/Six Sigma/Lean

Delivery

- Application Development & Conversion
- Business Process Services
- QA & Testing
- Application Rationalization
- Decommissioning Services

Program & Project Management

- PMO Services
- Change Management
- Program Improvement & Metrics
- Project Management Training (Certification)



A Few of Our Clients

CG's clients are some of the biggest names in the financial services industry.

Ally (formerly GMAC)

Bank of America

Capital One

Citigroup

TIAA-CREF

I would put CG at the top of the list of all the firms that I work with. They've helped us deliver technology projects that are just massive and difficult and very important to our business.

*– Longtime Client,
One of the world's largest
financial institutions*

The CG Difference

We have a distinctive way of doing business and it is reflected in the success and satisfaction of our clients. What sets CG apart?

Dedicated to Doing the Right Thing for Clients

Honesty and integrity are the cornerstones of our corporate culture. Every employee cares deeply about our clients and is committed to doing the right thing for them. We are highly responsive to clients' needs, driven to deliver results, and always accountable for the work we do.

Real-world Experience, First-hand Knowledge

We have extensive financial services expertise – gained in consulting and corporate environments – and we put it to use on day one of every engagement. In fact, our leadership team and consultants have worked in the financial services sector for most, if not all, of their careers.

Results Your Business Needs

We combine our expertise, strong work ethic, and proven project management skills to solve your most challenging and pressing business and technology issues. Our track record and results-oriented approach provides clients with higher than expected value for the price.

Scalability Meets Flexibility

Our size is just right: large enough to handle your complex enterprise-wide projects, yet agile enough to adjust to your specific needs. As a private company with a strong entrepreneurial spirit, we have the flexibility to work with clients in creative and accommodating arrangements.

Exceptional Services at an Exceptional Value

In a turbulent economy, doing more with less is the name of the game. Our size, experience, and approach enable us to offer clients exceptional services at an exceptional value.