

Performance Improvement

The branch continues to be the primary sales channel and leading indicator of customer satisfaction. Yet, few banks use an analytics-driven approach to improve individual sales productivity and branch performance.

Kiran's Performance Improvement study provides an assessment of branch performance (e.g. deposits, loans), sales productivity (e.g. positions, deposit accounts per FTE, loans closed per FTE, cross-sell), current processes and systems, and provides recommendations for improvement using an analytics-driven approach.

Applications:

- Universal banker
- Personal banker
- Business banker
- Financial advisor
- Mortgage advisor
- Branch manager

Deliverables:

- Assessment of sales performance, behaviors, processes, and tools
- Analysis of factors correlating with sales productivity
- Recommendations for setting realistic targets based on normalized performance metrics
- Recommendations for setting targets that are aligned with market opportunity
- Recommendations for talent acquisition and professional development
- Recommendations for aligning incentives with the behaviors that are critical for success



Key Benefits

- Improvement in sales productivity by position
- Improvement in branch sales performance
- Improvement in recruiting, professional development, and incentive

