

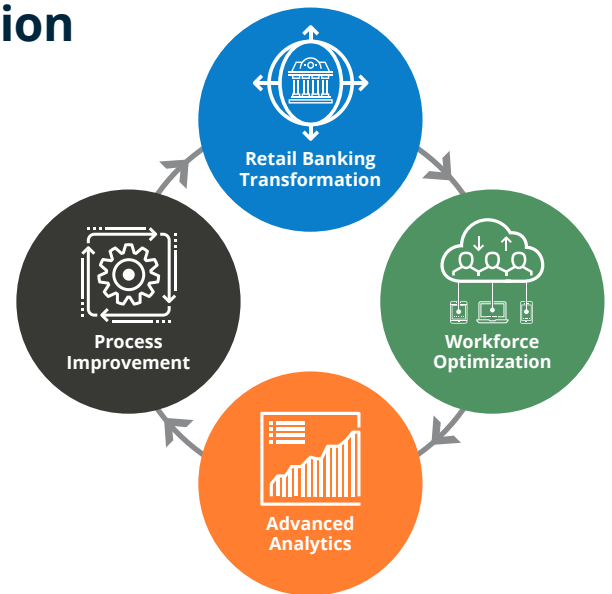
# Customized Process Improvement Services for Financial Institutions

Advisory Services

## Process Improvement and Optimization

Your financial institution's transformation journey and priorities are unique. That's why we customize our advisory services to address your specific needs.

Our passion for analytics-driven decision making, coupled with continuous process improvement enables us to serve our client banks and credit unions as their trusted consulting partners in their transformation journeys.



## Delivering Measurable Results



**\$25K**

incremental revenue increase per branch



**\$12.5K**

staffing cost reduction per branch



**80%**

reduction in overtime



**11%**

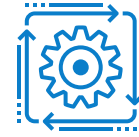
reduction in operating hours

# Customized Advisory Services that Drive Retail Bank Transformation



## Branch Operations Field Study

Provides a detailed view of customer arrivals and wait times, branch workflow, staff utilization, sales, service and non-customer facing activities.



## Back-office Process Improvement

Identifies inefficiencies and provides solutions, leading to improved customer service, workforce productivity and cost savings.



## Contact Center Process Improvement

Ensures that banks achieve the optimal balance of operational efficiency and customer experience using analysis and insights.



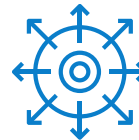
## Position Planning

Determines the specific roles to best address customer demand, achieve sales goals, and leverage opportunity for growth.



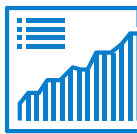
## Sales & Service Productivity Assessment

Provides an assessment of branch performance, sales productivity, current processes and systems.



## Distribution Optimization

Analyzes the branch and ATM network, services and operating hours, sales targets and customer service levels.



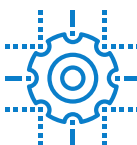
## Market Analysis & Industry Benchmarking

Evaluates market opportunities and sets realistic sales and service goals. It is typically coupled with our Distribution Optimization or Workforce Optimization services.



## Open Hours Optimization

Determines branch operating hours that are aligned with the market opportunities using analytics-based branch clustering methodology.



## Technology Utilization

Provides valuable insights to balance branch efficiency and optimal staffing levels to deliver outstanding customer experience.



## Wait Time Analysis

Utilizes a customizable analytics based methodology to address the number one factor impacting customer satisfaction—wait time.