

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



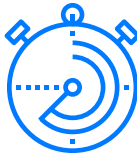
\$25K

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.



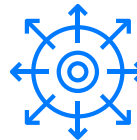
Position Planning

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



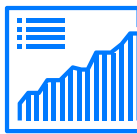
Sales & Service Productivity Assessment

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.



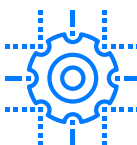
Market Analysis & Industry Benchmarking

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



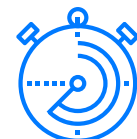
Open Hours Optimization

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.