

Sales and Service Process Improvement

Are your investments in training and CRM technology paying off?
Are your branch and individual performance targets realistic?

Kiran Analytics can help you.

Key Benefits



Improvement in sales productivity
by position



Improvement in branch sales
performance



Improvement in recruiting, professional
development, & incentive



Challenges with Sales and Service Targets and Performance

The branch continues to be the leading indicator of customer satisfaction and the primary sales channel. Banking executives are making investments in sales and service training and technologies like CRM systems. Yet, branch and individual performance targets are not realistic. Sales technology adoption is slow. Coaching initiatives and the new behaviors are not delivering the expected results.

There is a opportunity to set realistic performance targets, to deliver the ROI on training and technology investments, and to improve your sales and service performance using data and analytics.



Improve Customer Satisfaction and Performance

Kiran's Sales & Service Process Improvement service enables your financial institution to:

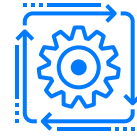
- Assess performance (new deposits, loans, fee income, referrals) across your sales team.
- Measure sales and service behaviors and sales technology usage to pinpoint training needs and coaching opportunities at all levels of the organization.
- Correlate customer facing behaviors and technology usage with customer satisfaction and sales/service performance.
- Set realistic targets for branch and individual performance.
- Use data to improve the quality and productivity of the sales and service activities through accelerated technology adoption, improved coaching, goal setting, aligned incentives, communications, and sales training.

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.



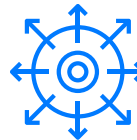
Position Planning

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



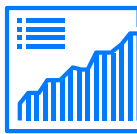
Sales & Service Productivity Assessment

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.



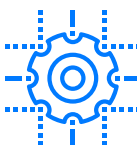
Market Analysis & Industry Benchmarking

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



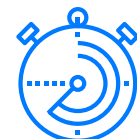
Open Hours Optimization

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.