

Thank you for reviewing *Bancography Plan*, an innovative product that offers a quick, intuitive method to estimate market potential for any branch location in the U.S.

**To launch the program, double-click on the *Bancography Plan* icon located on the desktop.**

**A couple of things to keep in mind as you test drive the software:**



The arrows signify what you think they would – moving forward or backward through the steps



The door with the arrow will close the current screen and return to the previous screen



These keys launch the help section and direct you to information on the topic presented on that screen. You may also access the Help Files located on the desktop.

**Map screens:** *all the maps in Bancography Plan utilize the Google Map interface. The tools available in Google Maps work the same way in Bancography Plan.*

This document briefly introduces the *Bancography Plan* software. Not all of the features are discussed in detail; we encourage you to discover its capabilities in your test-drive. If you need assistance during your trial, please click the help screens of the software as indicated above or click **[Add-ins/Information/Help]** at the top of any *Bancography Plan* screen. You may also call Bancography during normal business hours at (205) 252-6671 or send an email anytime to [info@bancography.com](mailto:info@bancography.com).

1. Launch *Bancography Plan* by double-clicking the icon on the computer desktop.
2. On the next screen (the main menu), click **Branch planning**. *Bancography Plan* will display Step 1, where you enter the address for the proposed branch.
3. This screen allows you to enter an address or select a point from a map by entering a zip code. Enter any U.S. street address, intersection, or street name. We've included some examples below. You may also click "Recent radii" or "Recent polygons" and recall a site from the drop-down list. After selecting an item, click the "use selected recent site."
  - a. 1400 West Broad St, Mansfield, TX
  - b. 6400 North Milwaukee Ave, Chicago, IL
  - c. 800 West Fletcher Ave, Tampa, FL
  - d. 200 Taunton Ave, Providence, RI
  - e. 1300 Lincoln Ave, San Jose, CA
4. Enter a trade area radius or select "suggest radius." A good starting point is two miles, but feel free to adjust depending on the density of the area.
5. Proceed to Step 2 by clicking on the forward arrow.

6. View the competitor list and deposit history and then click **View Demographics** to see consumer and business profiles of the trade area. Select **Segment Profile** to view the distribution of market segments within the defined trade area. Exit the segment profile screen and click **Show Map**. This will launch an internet browser window and Google maps. Mouse over any branch on the map to view its address and deposit history at the right of the screen. Use the Google map tools to zoom in or out, enter satellite mode or street view, etc. After viewing the trade area map, manually return to *Bancography Plan*.
7. Enter a projected five-year market penetration, or target market share. Refer to the suggested market penetration values or visit the help section for more information. Then click the forward arrow to advance to Step 3.
8. Enter product spreads, rates and costs, or use the defaults. Advance to the next step.
9. Click the preview button to view the reports. 
10. In this test environment, it is not possible to print or email the reports. However, you may export the reports to a local folder (*Bancography Plan*) and contact Bancography if you would like to receive copies.
11. Select **Add-ins/File/Return to Main Menu** at the top of the screen to test the other *Bancography Plan* components. From the main menu, click on the **Competitor profiles** button to create maps and lists of any institution's branch network, and click the **Market share reports** button to obtain quick share reports for any county or metropolitan area. The **Find target markets** function allows you to identify target areas for branch planning that meet various demographic criteria: five-year household growth, median age, head of household, median household income, population density, and/or employment/population ratio. Select the **Performance and overlaps** button to evaluate the performance of your institution's network or competing networks. These reports are especially valuable for sales management and merger evaluations. **Institution reports** show the locations and five year deposit history for all branches of a selected institution. Finally, the **Branch Profiles** section displays a series of reports that profile the demographic and competitive environment surrounding current branches, which can assist your institution in building marketing strategies.
12. Please close *Bancography Plan* when you have finished your session (Add-ins/File/Exit).
13. To leave the test-drive environment, select "Leave Hands-on Lab Session" from the "Sharing" menu.

Thank you for taking the time to evaluate *Bancography Plan*. If you would like to license the software or if you have additional questions, please contact Laura Levie at [laura@bancography.com](mailto:laura@bancography.com) or **205.252.6671**.