

THE ART OF POSITIONING

# bancography

BRANCH PRODUCT RESEARCH BRAND

## ABOUT BANCOGRAPHY

Bancography provides consulting services, software tools and marketing research to financial institutions to support their branch, product and brand positioning strategies. In support of our clients' current operations, Bancography performs product and profitability assessments.

For more information, contact us at (205) 252-6671 or [info@bancography.com](mailto:info@bancography.com).

## **Sales Performance Program**

Building a sales culture requires measurement systems to accurately track sales performance. A sales performance program includes a definition of the key drivers of branch sales performance and a reporting tool, or scorecard, to measure performance across those drivers. An effective scorecard reinforces sales training efforts and rewards outstanding performance. However, to maximize branch productivity, an incentive system must also include market-based sales goals that treat each branch consistently and equitably. Bancography designs custom sales performance programs that assist institutions in developing strong branch staffs and retaining top employees.

### **Branch Sales Goals**

- > Develop equitable, market-based sales goals for each branch
- > Goals can be set for all consumer and small business product types
- > Includes definition of branch trade areas
- > Goals impound market demographics, competitive environment, and institution current position
- > Goals can be denominated in dollars or units
- > All methods and calculations clearly documented

**Pricing: \$3,600 for up to 10 branches  
\$160 for each additional branch**

### **Sales Reporting Toolkit**

#### **Define program framework:**

- > Identify performance attributes to be measured (e.g. consumer checking accounts sold, loan account balance growth)
- > Create a process that is understandable to branch personnel
- > Determine incentive plan structure: participants, payments, etc.

#### **The automated toolkit application:**

- > Uses input files from MCIF or core systems
- > Reports can be generated by branch or for any rollup level
- > Reports show performance versus goals, branch rankings and payroll information
- > Bancography will train personnel on how to use the reporting tool

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