PRODUCT
DATA SHEET

PERFORM.360™ for Retail Banking

MAXIMIZE BRANCH PERFORMANCE AND EMPOWER LOCAL MANAGERS THROUGH AN INTEGRATED SUITE OF APPLICATIONS

Product overview

Now you can effectively align your sales force and marketing resources with the true market potential of each branch. PERFORM.360™ is a suite of solutions for evaluating and improving the sales performance of branch networks. With these tools, you can understand market opportunities, benchmark performance, quantify potential and allocate sales goals equitably and efficiently.

Setting rational sales expectations significantly improves the effectiveness of your sales team and your incentive compensation dollars, ultimately leading to an overall increase in sales. Better allocation of sales goals increases your likelihood of achievement and overall performance—stemming from a more motivated sales staff with realistic goals.

Empower your sales force to achieve more

Sales Assessment and Goal Setting maximizes branch performance by establishing objectives that are specific, measurable and attainable. This module is driven by our extensive understanding of consumer behavior. By accounting for the specific set of opportunities and unique environmental constraints confronting each sales point, our methodologies focus management attention on performance objectives.

Local Knowledge provides a complete view of each branch's customer base, trade area characteristics, competition and performance metrics.

Network Analysis provides sophisticated summary reporting across branches and higher levels in the network hierarchy, which allows corporate and regional management to identify top performers as well as those branches that require attention.

The result? An effectively aligned sales force, marketing resources and branch potential—well-positioned for success. All of this and more is available through a web-enabled application that provides easy distribution to branch staff. A desktop version is also available.

EXPECTED ROI

A more informed and better focused branch management and sales staff dramatically increases sales and significantly improves overall branch performance

- Consistent market intelligence
- Streamline the sales planning process
- Easily communicate branch goals
- More effective household targeting
- Reduce staff turnover

Pitney Bowes
Software

Added value

Sales Assessment and Goal Setting Module

Branch environments, trade areas and customer data are evaluated to group branches into peer segments for comparison of performance without the biases of extraneous, uncontrollable environmental factors—so you can set risk-adjusted product level sales goals for each sales point to both new and existing customers.

Goal allocation is based on a sophisticated benchmarking process against an extensive database of branch sales performance in the industry. You can set goals in net and gross volume views in terms of units or balances. User-defined portfolios and products to enable unique client reporting and goal allocation, while seasonality planning facilitates monthly, quarterly, semi-annual, or annual campaigns.

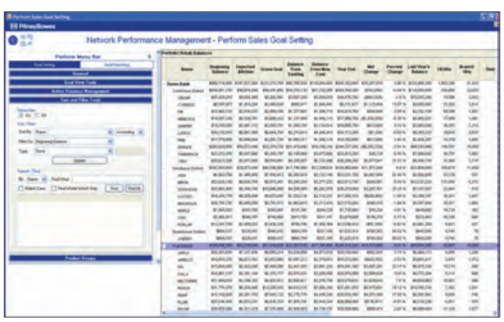
Local Knowledge Module

Drive sales by significantly improving your understanding of the unique opportunities and competitive environment around each branch. With this powerful tool, you will gain valuable insights into relevant measures of market potential, competitive intensity and performance of each branch, so sales teams can plan and execute more effectively. Details include trade area demographic and competitive profiles, branch customer metrics, branch diagnostic reporting, benchmark metrics and branch goal summaries.

Network Analysis Module

Gain easy access to hundreds of branch and trade area characteristics through standard and custom reporting and graphing tools. All of the opportunity-based variables that are available to the branches through *Local Knowledge* are included for comparison across the institution or hierarchies within the bank—significantly improving your understanding of the unique opportunities and competitive environment around each branch.

Network Analysis allows you to diagnose performance issues across your network and create analyses to maximize the opportunity available. The reports can be used to determine which set of branches require more support from marketing, additional sales staff or goal management.



Establish performance expectation.

View trade area maps and thematics based on the variables you select.

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SPECIFICATIONS

Minimum Requirements to run PERFORM.360™

SQL Server System Requirements
1 GB RAM
1 GB free hard-drive space
DVD-ROM drive (recommended)
Microsoft Windows - XP or later
Microsoft Windows Installer 4.5+
Microsoft .NET Framework 4.0+
Microsoft SQL Server/Express and Management Studio – 2005 or later

IIS (Local Knowledge) Server System Requirements
1 GB RAM
10 GB free hard-drive space
DVD-ROM drive (recommended)
Microsoft Windows - XP or later
Microsoft Windows Installer 4.5+
Microsoft .NET Framework 4.0+
Microsoft IIS 5.1+
ASP.NET 4.0.30319+

End-User System Requirements
512 MB RAM (1+ GB recommended)
1 GB available hard drive space
Microsoft Windows - XP or later
Microsoft Windows Installer 4.5+
Microsoft .NET Framework 4.0+
Microsoft Internet Explorer 6.0+ or Mozilla Firefox 2.0+

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