Data sheet

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Software & Data
Location Intelligence

PERFORM.360™ for retail banking

Understanding attainable potential to maximize branch performance.

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 sales staff more motivated by realistic goals.

P360 increases the efficiency of your goal-setting process and delivers ROI.

A more informed, better-focused branch management and sales staff dramatically increase sales and significantly improve overall branch performance. Among the many benefits:
• Consistent market intelligence
• Streamline the sales planning process
• Easily communicate branch goals
• More effective household targeting
• Reduce staff turnover

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 that intersect each sales point, our methodology brings focus to

management in order to achieve their 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 enables

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 that are well-positioned for success. All of this and more is available through desktop and web-enabled applications that allow for detailed analysis by central planners as well as easy distribution to branch staff.

Added value

Sales assessment and goal setting

Trade area market data, branch facility characteristics and customer data are evaluated to group branches as peer segments for comparison of performance without the biases of extraneous, uncontrollable environmental factors. In this way, you can set risk-adjusted, product-level sales goals for each sales point covering both new and existing customers.

Goal allocation is based on a sophisticated benchmarking process against an extensive database of branch sales performance. You can set net or gross goals for units or balances. You can also create user-defined portfolios and products that enable unique client reporting and goal allocation. In addition, the seasonality planning facilitates monthly, quarterly, semi-annual and annual campaigns.

Local knowledge

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. Armed with this knowledge, your sales teams can plan and execute more effectively. This information includes trade area demographic and competitive profiles, branch customer metrics, branch diagnostic reporting, benchmark metrics and branch goal summaries.

Network analysis

Gain easy access to hundreds of branch and trade area characteristics through standard and custom reporting. The complete set of opportunity-based variables that are available to the branches through Local Knowledge are included for comparison across the institution or hierarchies within the bank. This information significantly enhances your understanding of the unique opportunities and competitive environment around each branch.

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

Product data

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+
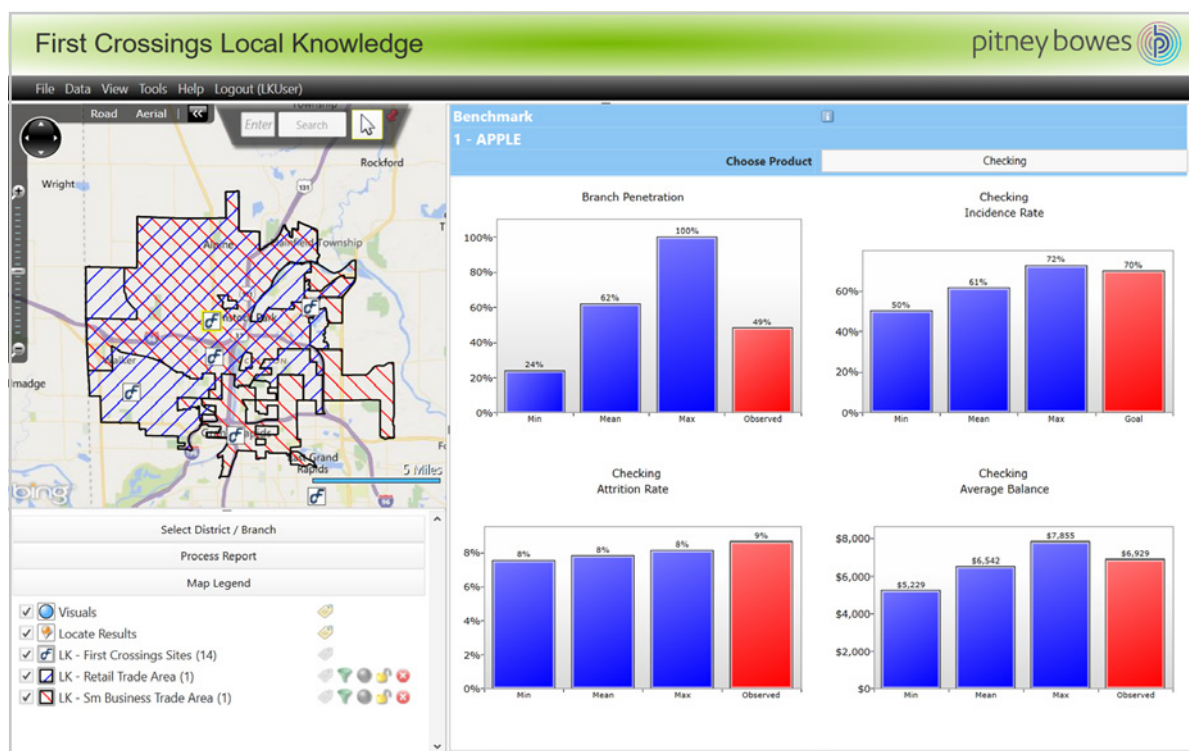Microsoft Internet Explorer 6.0+ or Mozilla Firefox 2.0+

Set goals for all products. Change goals by branch or hierarchy. Automatically reallocate changes to the remaining branches.
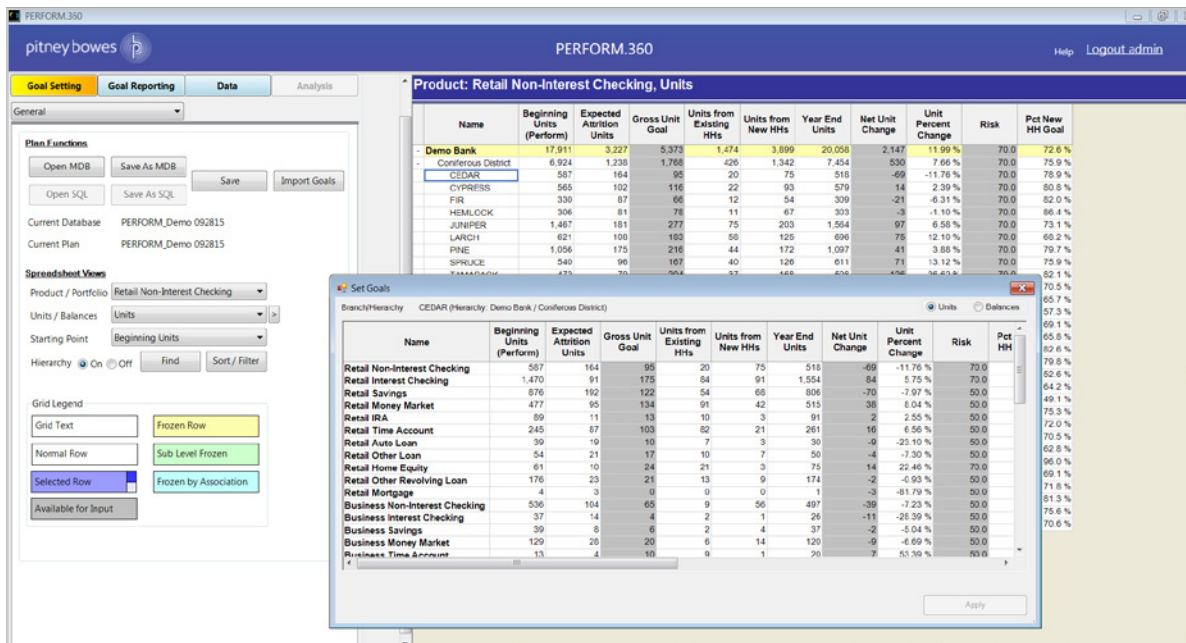
Visualize each branch's trade area and key KPI's relative to peer branches.
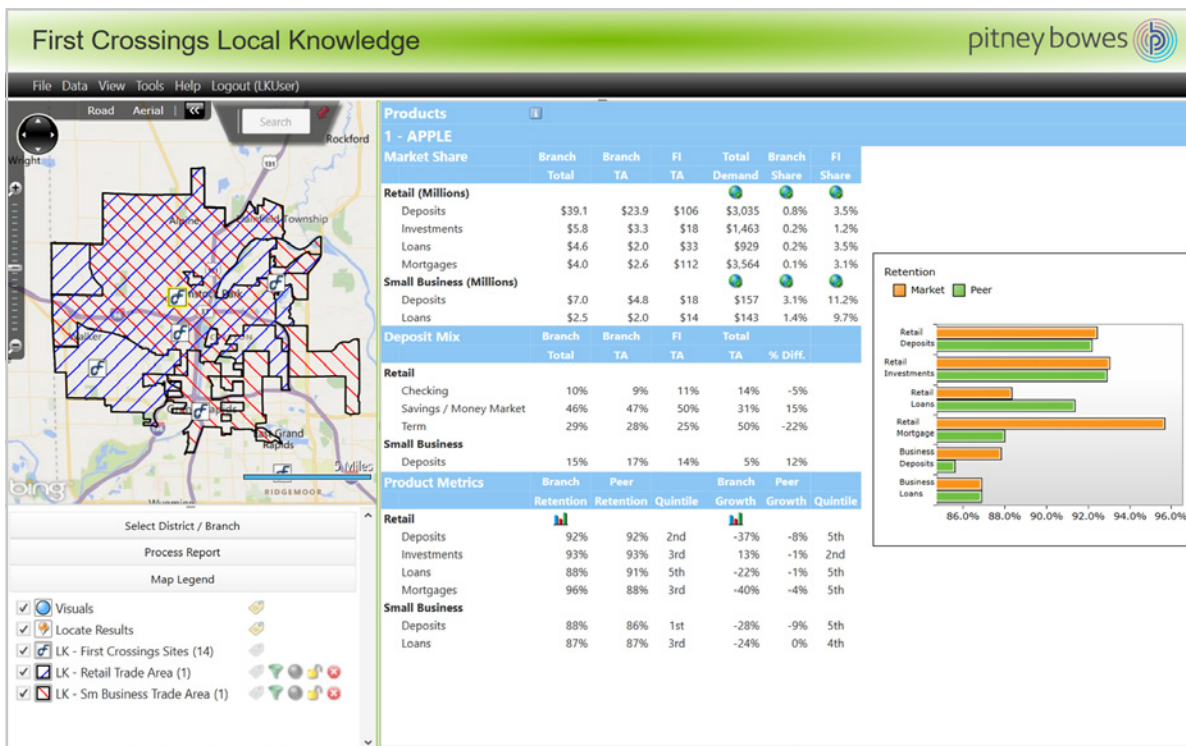
Benchmark current branch performance to peers to identify true branch potential