



Growth & Innovation Workshop

Competitive advantage is the key to high-growth in financial services. Creating, achieving and sustaining an advantage requires insightful thinking as well as disciplined execution. To help financial institutions succeed in this highly competitive and challenging environment, CPG offers Growth & Innovation Workshops.

These workshops are designed to spark innovation and creative thinking on key issues and opportunities that matter most to an organization. For example, the workshops can be designed to:

- Define the next-generation growth and profit strategies for the institution.
- Uncover product line and pricing strategies for success in challenging environments.
- Identify innovations that will lead to efficiency improvements throughout the organization.
- Reinvigorate the firm's value proposition, determining next generation payoffs for customers that will drive competitive advantage going forward.
- Address specific issues, such as the degree to which technology is fully leveraged, that affect the profitability of an institution.

In addition to using the Workshops as an idea generation tools, the workshops will help your company define specific actions and set responsibilities to jumpstart the implementation process. Idea generation is the first step, but exceptional execution of great ideas is what makes a financial institution successful. CPG's experience in turning ideas into tactical and actionable programs for success are what sets the firm apart.

How it Works

The Growth & Innovation Workshops generally run from a half a day to two full days and offer a flexible format that allows CPG to focus on the most important issues to the client. Workshops include:

Pre- and Post Workshop Input

- Preparatory interview sessions with key executives and staff
- Pre-workshop briefing package containing thought-provoking articles, best practices information, and assignments for participants
- Workshop review session with key executives and staff

Workshop Format

- Industry/ line of business overview – industry and client-specific
- Team break out work session options:
 - Standard facilitated brainstorming break out sessions
 - “Put yourself out of business” break out sessions
 - “Cash infusion” break out sessions
 - “Innovation” break out sessions
- Team presentations
- Discussion/ judging of presentations
- Facilitated wrap-up discussion

For more information and to determine how we can support your business performance improvement efforts, please contact us at (202) 337-7870 or info@capitalperform.com

Benefits of the Next Generation Workshops include:

- Generation of interesting and innovative ideas to address your most pressing business issues
- Identification of the strategies and tactics that lead to success in an open, accepting and creative environment
- Ability to debate important strategic options, as well as the pros and cons of ideas and changes
- Identification of an action item list, critical success factors and obstacles to success that must be overcome for idea and program execution
- Improved team camaraderie and buy-in to the business' priorities

About the Firm

Capital Performance Group is a management consulting firm based in Washington, DC. Our firm provides advisory, planning, analytic, and project management services to the financial services industry. Our professionals possess deep experience in a broad range of functional specialties including strategic planning, sales management, quality engineering, marketing and product development, market research, risk management, operations and technology, compliance and regulatory matters, mergers and acquisitions, and strategic cost management.

What makes CPG Unique

Experience — We are knowledgeable industry “insiders.” Our professionals have an average of over 20 years experience in the financial services industry.

Focus — We are financial services industry specialists. We have developed unique tools and methodologies to address the specific business issues and challenges of this industry.

Practicality — We know what it takes to implement and manage strategic initiatives. We provide hands-on assistance and actionable advice.

For more information, please contact us at 202/337-7870 or email us at info@capitalperform.com.

Our Leadership Team

Mary Beth Sullivan, Managing Partner

Mary Beth specializes in strategic development and marketing program design for financial services companies. Mary Beth has extensive experience in strategy development, marketing segmentation and product design, distribution planning, sales program design, financial and risk analytics, and operational reengineering. Prior to joining Capital Performance Group, Mary Beth was Senior Managing Director at Furash & Company, where she led the firm’s business development efforts and worked with many of the leading financial services companies in the U.S. Mary Beth also held the positions of Vice President and Marketing Manager and Assistant Controller with Chemical Banking Corporation in New York. Mary Beth can be reached at 202-337-7872 or msullivan@capitalperform.com.

Claude Hanley, Partner

Claude has been a management consultant to the financial services industry for more than twenty years. Claude has worked extensively with financial institutions in such areas as business planning, financial advisory, and public policy and regulatory compliance. Prior to joining Capital Performance Group, Claude was Managing Director at Furash & Company where he led the firm’s regulatory policy and mergers and acquisitions advisory teams. Claude can be reached at 202-337-7875 or chanley@capitalperform.com.

Gary Stein, Partner

Gary specializes in developing and implementing performance improvement initiatives for Capital Performance Group’s clients. Gary provides consulting in the areas of delivery system analysis and design, market opportunity analysis and planning, product development, and business process reengineering. Prior to joining CPG, Gary was a Principal with Furash & Company where he managed the firm’s Retail Distribution practice area. Gary also held the position of Assistant Vice President at Signet Bank in Richmond, Virginia and was a management consultant with both Coopers & Lybrand LLP and Andersen Consulting. Gary can be reached at 202-337-7875 or gstein@capitalperform.com.

Mary Ellen Georgas, Consulting Associate

Mary Ellen has expertise in strategic planning, including a focus on eBusiness and online channel strategy. She specializes in end-to-end eBusiness management including setting objectives, revenue planning, expense management, site governance, development prioritization, project management, performance analysis, and ongoing operations. Prior to working with Capital Performance Group, Mary Ellen served as Vice President of Treasury Internet Services Product Management and Internet and ATM Product Management at JP Morgan Chase. She was also a Managing Director at Scient, and a Principal at Furash & Company. Mary Ellen can be reached at 908-233-9009 or megeorgas@capitalperform.com.



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