



# Onboarding Improvement Workshops

Capital Performance Group has analyzed the onboarding programs of numerous institutions and found most generate results due to design flaws, inconsistent execution, or both. Capital Performance Group's Onboarding Improvement Workshop provides best practices insight and a comprehensive analysis framework to help you quickly assess and enhance this vital function.

**CPG's Onboarding Improvement Workshop** is a one-day, facilitated, information-driven discovery and planning session designed to give you a quick yet comprehensive assessment of your current program and position you to take fast and effective corrective action.

## What You Get

1. A comprehensive picture of the new customer experience at your organization today;
2. Feedback on practices and performance related to new customer onboarding, cross-sales, and relationship development;
3. Identification of key improvement opportunities—including quick hits—for your institution and an initial sense of requirements and potential benefits;
4. Agreement on critical next steps and momentum for taking corrective action; and
5. A written summary of key findings, decisions, and next step responsibilities.

## How it Works

The **Onboarding Improvement Workshops** typically run for one full day but can be tailored to meet your needs. We offer a flexible format that allows us to focus on the most important issues for each client.

### Prior to the Workshop

We will meet with you via phone to understand your specific objectives for the workshop, finalize the workshop agenda and logistics, and determine appropriate participants. We will also provide templates and discussion outlines to guide data collection and ensure a quality workshop.

### Workshop Agenda

Typical components include current program and responsibility reviews, performance analyses to help focus constructive dialogue, process mapping, communications assessments, and evaluations of quality control and execution support capabilities. Time is reserved for redesign efforts to enable smooth transition to implementation. Sessions conclude with facilitated wrap-ups.

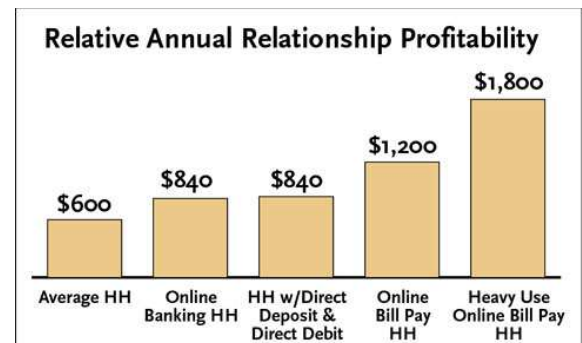
### After the Workshop

We will summarize workshop results, meet with you to debrief, and ensure a clear path for moving forward.

Better onboarding =

Improved retention  
Deeper cross-sales  
Better customer experience

= Higher profits



Source: CPG, 2010; Aspen Marketing, 2009.

## What's Covered

1. Financial and performance objectives for the new customer onboarding program (if defined).
2. Data pertaining to customer acquisition, balance growth, service cross-sell penetration, service utilization/activity, and onboarding activity and results.
3. How the following processes work across all channels today:
  - a. Account opening (new and existing customers)
  - b. New account funding
  - c. New account fulfillment
  - d. Onboarding/outbound communications
  - e. Service (OLB, BP, debit card, e-statement, etc.) enrollment and activation
4. Key technologies, tools, incentives, and support mechanisms.
5. Customer collateral and performance reports, including mystery shop or new customer survey results, if applicable.
6. Chronology and descriptions of relevant performance improvement efforts and key changes in tactics.
7. Pressing concerns and issues.

## Why CPG?

### We know onboarding

We have examined and improved the onboarding programs of many community and regional financial services companies. We know the weaknesses that banks tend to exhibit, the tactics that drive superior performance, and the requirements, structure, and discipline necessary to effect change and cultural acceptance.

### We have proprietary insight

Our experience with countless banking institutions has enabled us to amass a deep database of industry best practices and performance benchmarks. We can even provide feedback on internal process metrics, such as cycle times, fallout rates, and other indicators of issues hindering end performance.

### We are process redesign experts

We bring structure, field-tested tools and methodologies, and outside objectivity to help you hone in on what matters and generate consensus for what to do. Most importantly, we have a long track record of enabling our clients to succeed; we will do the same for your organization.

## Workshop Leader

### *Gary Stein, Partner*

Gary specializes in developing and implementing performance improvement initiatives for CPG's commercial- and consumer-focused clients. Gary has deep experience in the areas of reengineering sales, service, marketing, and underwriting processes; delivery system analysis and design; market opportunity analysis and planning; financial analysis; and the design and development of advanced analytic tools and models. Prior to joining Capital Performance Group, Gary was a Principal with Furash & Company, and before then, at Signet Bank in Richmond, Virginia in charge of all Retail bank reengineering initiatives. Gary can be reached at 202/337-7876 or [gstein@capitalperform.com](mailto:gstein@capitalperform.com).

## Workshop Cost

Typically up to \$5,000 + travel expenses

## Upon Completing the Workshop

CPG can help your bank to ensure improvement opportunities are realized by providing implementation support. CPG implementation support services include:

- Account Opening Process Design
- Customer Communication/Onboarding Process Design
- Service Enrollment and Activation Process Redesign
- New Customer Experience Value Proposition Development
- RFP and Vendor Selection Support (OLB, BP, OAO, etc.)
- Performance Measurement Framework Development and Implementation
- Sales Collateral and Tool Development and Implementation
- Representative Advocacy Improvement Program
- Customer Segmentation and Data Mining

**For more information: please contact Gary Stein at 202/337-7876 or [gstein@capitalperform.com](mailto:gstein@capitalperform.com).**

## About CPG

Capital Performance Group is a management consulting firm based in Washington, DC. Our consultants have years of experience in working with financial services companies as strategists, marketers, and operational managers. We understand what drives performance in the financial services industry and how to help our clients meet their business and financial objectives.

