

CPG's Internet Solutions

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 info@capitalperform.com.

Popular Internet Solutions

Capital Performance Group offers a number of consulting and implementation services to support our clients' efforts to improve performance, manage change, and execute new strategies. We draw upon many of these solutions as part of broader consulting engagements. Our projects are often customized to meet individual client needs.

1. Internet and Electronic Channel Strategies

Create a compelling Internet vision and next-generation strategy that supports your corporate objectives. The outcome of our highly participative process will identify value propositions to create effective differentiation, accelerate growth, enable improved financial performance, and delineate the positive and negative implications of recommendations on existing functionality, organizational structure, accountability, processes, and management tools.

2. Organizational Design and Effectiveness

Identify the most effective organizational structure for fulfilling your Internet vision. We will assess the design of your current organization and determine its effectiveness, its strengths, and the barriers it may present to the accomplishment of your strategic and tactical goals. Using this information, we will evaluate and recommend alternative structures that ensure clear assignment of roles and responsibilities and effective management of your Internet program. We will help you understand the pros, cons, costs, and benefits of various structures to help identify what will work for your organization.



3. Governance Processes

Create a process for identifying, evaluating, prioritizing, funding, and managing Internet and other electronic channel-related initiatives to maximize the value of your investments. We will build a governance process that can be applied enterprise-wide to support rational decision making, give senior managers a consolidated view of the company's channel initiatives, and measure the return on your investments.

4. Performance Metrics and Analytics

Track your performance to pinpoint opportunities for improvement. We will provide a tool kit of metrics and analytics to support better management of channel operations and evaluation of investment opportunities. We will work with you to identify, collect and analyze appropriate data for weekly, monthly, quarterly, and annual analysis; design the right reporting for each of your stakeholder audiences, and provide industry perspective and benchmarks for comparison and goal-setting.

5. Process Assessment and Reengineering

Assess existing Internet processes from project initiation to implementation and management of online functionality to streamline processes and eliminate wasted opportunities. We evaluate current business, customer experience and technology development processes relative to industry best practices and help to develop internal performance scorecards. Our process illuminates quick-hit opportunities and enables the identification and prioritization of major improvement initiatives using an objective, fact-based approach.

SUGGESTED PARTNERSHIP SELECTION CRITERIA
1. Fit with functionality and market segments
2. Customer usability
3. Ease of integration and time to market
4. Customization capabilities
5. Stability and scalability
6. Overall cost/value
7. Strong relationship management team/vendor viability

6. Vendor Selection and Management Services

Find the best partner using a set of standardized, objective evaluation criteria and a deliberative process. CPG professionals will help you research, evaluate, and select appropriate product and service partners. Our Vendor Selection Process is an efficient and effective four step program for your institution to evaluate providers. Because no two situations are exactly the same, the process can be customized to fit the needs of your business. In addition, we provide guidance to effectively manage vendor relationships on an ongoing basis.

A Sample of Recent Project Work

- ◆ Created a next generation online strategy, operating model, and organizational structure for a Midwest bank, including retail and wholesale online applications. Results and recommendations led to significant re-structuring of online application management and operations throughout the institution.
- ◆ Developed an Internet strategy for the largest retail bank in France. Outcomes included enterprise-wide Internet strategy, governance recommendations, industry benchmarking, and identification of new Internet business opportunities.
- ◆ Created an enterprise Internet strategy for a leading global custodian and asset management institution. Identified an Internet innovation framework to consolidate, prioritize, and manage initiatives, as well as several highly innovative and leveragable plays to create new revenue streams. Rationalized existing Internet efforts within the enterprise.
- ◆ Created a global eBusiness vision and strategy for a leading international stock exchange. The strategy addressed several different markets, geographies, financial instruments, and constituencies.
- ◆ Conceived and designed the next generation online brokerage service for high net worth clients of a leading boutique investment bank. Engagement included market assessment, competitive survey, strategic positioning, functionality identification and prioritization, and detailed implementation plan.
- ◆ Recommended new organizational and management structures for the retail and treasury websites of several clients. Work included:
 - ❖ Setting business objectives
 - ❖ Revenue planning
 - ❖ Site metrics and analytics
 - ❖ Site prioritization and governance frameworks
 - ❖ Business requirements and functional documentation
 - ❖ New feature/function launch plans
 - ❖ Site operations management including issue resolution, and identification of new ideas, products, and features
 - ❖ Implementation

