

## Team Effectiveness Program

This program is designed to improve the ability of your leadership team to accomplish its business objectives by increasing motivation, removing obstacles to high-productivity, and improving work practices. We will lead your team through a facilitated process designed to create:

- ◆ A common understanding of and commitment to the priorities, goals and objectives for the year;
- ◆ An understanding of the barriers and obstacles to success (budgets, resource constraints, operational or technical limitations, skill set issues, etc.);
- ◆ A commitment by the team to overcome these;
- ◆ A clear understanding of roles and responsibilities of each team member as it relates to the group's overall success; and
- ◆ Straightforward processes to speed decision-making and improve communication.

**Turn profit plan information and team goals into the teams' action plan for 2007**

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**Identify obstacles and barriers to team effectiveness via team member interviews**

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**Meet as a leadership team to build an internal game plan for meeting 2007 objectives**

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**Summarize results into a short scorecard for the team to use  
to review progress at regular intervals**

You and your leadership team will experience positive changes in your work environment and realize tangible results from this process. This process will deliver:

1. Improved team camaraderie and buy-in to the team's priorities.
2. An action item list designed to improve the ability of the team to meet its goals.
3. Clarity regarding individual team members roles and responsibilities and the most significant obstacles that must be overcome.
4. A concise scorecard to use to monitor progress throughout the year.

**For more information or to determine how we can support your 2007 efforts,  
please contact us at (202) 337-7870 or [info@capitalperform.com](mailto:info@capitalperform.com).**

## Our Leadership Team

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**Mary Beth Sullivan, Partner** 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 CPG, 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.

**Claude A. Hanley, Jr., Partner** 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 CPG, Claude was Managing Director at Furash & Company where he led the firm's regulatory policy and M&A advisory teams.

**Gary Stein, Partner** specializes in developing and implementing performance-driven business initiatives for CPG's clients. Gary provides consulting in the areas of delivery system analysis and design, market opportunity analysis and planning, product development, financial modeling, and business process reengineering. Prior to joining Capital Performance Group, Gary was a Principal with Furash & Company where he managed the firm's Retail Distribution practice area. Before then, Gary was an AVP and Retail Bank Operations Manager at Signet Bank in Richmond, Virginia and a management consultant with both Coopers & Lybrand and Andersen Consulting.

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**The CPG Consulting Associate Group** brings deep expertise to the firm across a wide range of industry disciplines. Our Consulting Associate Group includes:

**Ed Furash**, former Chairman of Countrywide Bank, a subsidiary of Countrywide Financial, and founder of Furash & Company, widely regarded as a financial industry expert and visionary.

**John Barrickman**, President of New Horizons Financial Group with expertise in risk management, commercial banking and private banking.

**Rolland Johannsen**, former SVP of JP Morgan Chase and President of Furash & Company, with expertise in retail financial services, marketing strategy design, and marketing and sales execution.

**Ed Neumann**, Principal of Javelin Strategy & Research, with expertise in payment systems, electronic commerce and financial technology.

**Frances Davis**, former SVP of JPMorgan Chase with expertise in consumer financial services, electronic delivery, and payments.

**Neal Chambliss**, EVP of Phoenix Marketing, Inc., a market research firm specializing in the financial services industry.

**Mary Ellen Georgas**, former Vice President of Treasury Internet Services and ATM Product Management at JPMorgan Chase and Principal at Furash & Company.

In addition, CPG has long-standing relationships with a number of subject matter experts and specialty advisory firms that can be leveraged depending on the specific nature of our assignments.

