

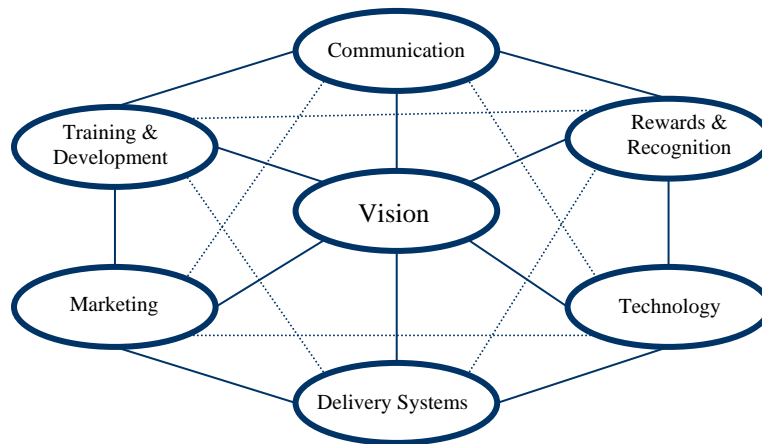
People are what make the difference!

Banks on every corner offer the same products and services. Each tries to differentiate itself from the competition. *It is the people who set them apart.* As a result, a powerful customer service and sales culture is vital to a bank’s organic growth, independence and stockholder equity.

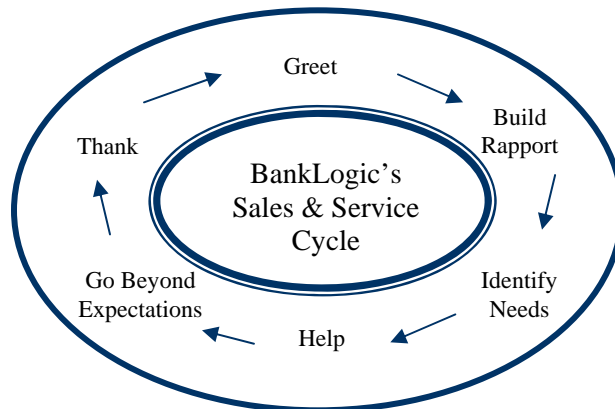
BankLogic provides performance consultation, methodologies, customized training solutions and workshops designed to achieve our client’s objectives and boost bottom-line results.

Methodology:

BankLogic uses a large systems model to help build strong service and sales cultures. It starts with the organization’s vision, goals and objectives. It then takes into account the interrelated systems that are vital to maintaining a strong and aligned client focus, including how the vision is communicated; how people are rewarded and recognized for positive performance; what role technology plays; expectations of delivery channels; how marketing aligns; and, last but not least, how the people are trained, developed and led to have a client centered approach.



Whether a bank’s employee is working with retail, commercial, wealth management or even internal clients, the BankLogic “Sales & Service Cycle” is fundamental for dealing with every client at every level. Developed from a consortium of proven sales and service approaches, and customizable based on the bank’s philosophy; each step is clearly defined and explored in depth for maximizing client satisfaction.



BankLogic partners with banks to further define success measurements, build in accountability metrics and development opportunities for employees, which in turn impacts organic growth and overall bottom-line performance.

Sample success and accountability metrics may include:

- Client focus groups
- Goal setting approaches
- Sales tracking mechanisms
- Mystery and first impression shops
- Cross-pollinating best practices
- Rewards and recognition programs
- Sales and service campaigns
- Client Relationship Management Systems

Sample sales and service development opportunities may include:

- Frontline Service and Sales Techniques
- Platform Consultative Selling
- Sales & Service Leadership
- Coaching the Coach; Transferring Sales & Service Knowledge
- Internal Client Service & Leading Internal Client Service
- Increasing Primed Referrals Across Business Units
- Teleconsulting - Calls for Success

Industry specific, technical and social skills training also available:

- Teller training
- Platform training
- Small Business training (There is nothing small about small business!)
- Compliance and Security training solutions (BSA/AML)
- Microsoft Office Suite (Word, Excel, PowerPoint and Outlook)
- Supervisory & Leadership Skills training
- Performance Management



Biography:

Dana Ritchey Muth is Director of the Strategic Planning, Training and Organization Development practice at BankLogic. She has worked in the financial services industry for 15+ years, where she has been a catalyst for building, leading, influencing and maintaining powerful sales and service, performance driven cultures. With extensive sales and service training and organization development initiatives under her belt, she has helped regional and community banks grow loans, deposits and fee income. Zealous and driven, Dana has the unique ability to build trust and engage the workforce to dramatically produce results.

Dana earned her Master's in Organization Development & Analysis from Case Western Reserve University and has over 10 years experience using the psychological and social sciences to align people, performance and profits.

Dana has taught for the University of Pittsburgh's Katz Graduate School of Business, the University of Phoenix (online and on-ground), Point Park University and Slippery Rock University's Workforce Development Program.