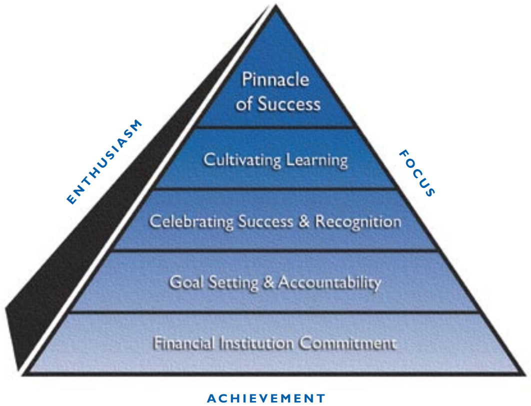

THE ALLIED ADVANTAGE

The Allied Advantage describes the unique and personal partnership that we develop with our clients. The Client Development Management (CDM) team works with you to execute a process to determine specific client goals and drive results. A successful partnership and program evolve when the financial institution provides visible support and recognition of staff tied to accurate and timely tracking. It is further enhanced when effective learning solutions are incorporated. Working together, we enthusiastically focus on achievement.

ALLIED SOLUTIONS

To find out how the Allied Advantage and our Client Development Experts can positively impact your business, call our regional management team at 800.826.9384.

Western Region - Sherry Deeds, ext. 55195
Midwest Region - Karen Worke, ext. 55259
Northeast Region - Trish Delaney, ext. 55196
Southern Region - Koren Wylie, ext. 24130

ALLIED SOLUTIONS

CLIENT DEVELOPMENT SOLUTIONS

A COMPONENT OF THE ALLIED ADVANTAGE

CLIENT DEVELOPMENT SOLUTIONS... A COMPONENT OF THE ALLIED ADVANTAGE

Our Consultative Approach Sets Us Apart

Our client development process begins with comprehensive research and a needs analysis of your financial institution.
In collaboration with your management team, a plan is developed to grow your sales and service culture. This plan typically includes recommendations and support in areas like lending solutions, coaching empowerment, employee sales and service training, and recognition consulting.

Discovery Learning & Development

"Building Belief" in products is fundamental to our process.
By helping your employees understand the competitive advantages of your financial institution endorsed products, we encourage them to proactively offer them with genuine enthusiasm. As a result, you are more likely to improve your income, lending margins, and cross-selling opportunities.

Our integrated sales training approach utilizes interactive exercises crafted to uncover 'Best Practices' and built to provide the opportunity to practice skills and techniques. Whether your employees are new hires or long-term associates, entry level or executive management, we have workshops available to meet their needs.

THE PROCESS... A COMPONENT OF THE ALLIED ADVANTAGE

What do we do? Why do we do it?

We begin with a needs analysis.
Our key objective here is to learn as much about you and your business needs as possible. We meet with your leadership team to gather information in order to formulate appropriate recommendations.

Examples of areas we explore include the following:

- Your Current Environment
- Your Goals & Objectives
- Your Key Leaders & Stakeholders

Once we perform the needs analysis, we develop the plan:

- Plan represents joint goals and objectives
- Based on current environment, priorities & initiatives
- Define joint roles within Allied and financial institution
- Show management support of the overall plan and program

Once we have a plan, we finalize and execute deliverables:

- Ensure timely communication
- Conduct periodic reviews to assess progress
- Address obstacles and challenges

DISCOVERY LEARNING WORKSHOPS

Once we have determined what your organization's needs are and a plan has been developed we will work together to carefully cultivate learning within your organization.

Our Discovery Learning approach is specifically focused on the competencies required of successful employees in top notch financial institutions.

Workshop topics may include:

- Technical & Product Knowledge
- Consumer Focus
- Presentation Skills
- Professional Communications
- Motivation
- Leadership

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