

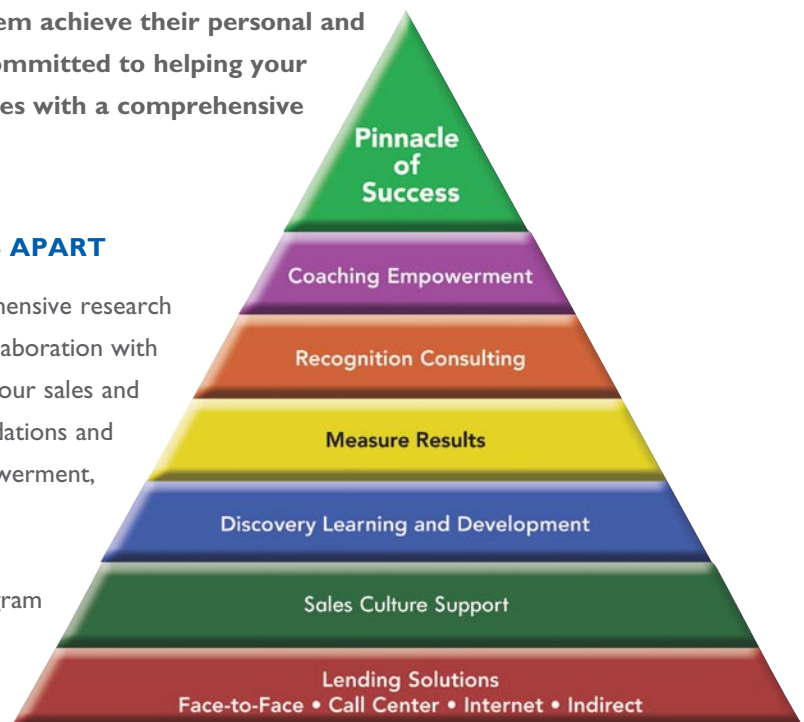


CLIENT DEVELOPMENT SOLUTIONS A COMPONENT OF THE ALLIED ADVANTAGE

You pledge to your clients that you will help them achieve their personal and financial objectives. Allied Solutions is just as committed to helping your financial institution achieve its financial objectives with a comprehensive support philosophy.

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. We meet with you throughout the year to provide ongoing consultation to ensure that your program is meeting the goals of your organization. Regular updates include product participation, financials, claims history, and other measurements that are meaningful to you for budgeting and goal setting.



DISCOVERY LEARNING AND 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.

We have varied learning workshops focused on product presentation skills, consultative sales skills, coaching, building relationships through lending competency, consulting to improve Call Center efficiency and motivational sessions. Through our instructor-led training, “Train-the-Trainer” options, one-on-one coaching, e-learning, virtual and distance training methods, we are able to offer something for everyone who interacts with consumers at your financial institution.

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.

Our workshops are used to enhance ongoing internal initiatives and objectives while serving as a catalyst for powerful buy-in and support.

CLIENT DEVELOPMENT SOLUTIONS

COACHING EMPOWERMENT

Our coaching process takes leadership to a whole new level. A study of industry “best practices” has shown that management commitment yields increased participation, sales, and income.

Coaching Empowerment is designed for leaders and managers who have an interest in increasing the productivity and success of their teams. The coaching process focuses on empowering your managers to take an active role in leading their teams to success. Through follow-up meetings, we also encourage managers to report on their progress and learn from the coaching experiences of their peers. Overall, this process initiates commitment and accountability and encourages coaching skills that can be used to produce product champions across your financial institution

RECOGNITION CONSULTING

We provide our clients with leading-edge research to bring them the latest ideas and trends for employee recognition and motivation. Allied Solutions provides recognition themes and recommendations to maximize your program’s product sales growth. We also help you identify priorities and match them to a recognition program that emphasizes your goals between product lines and various vendor programs.

MEASURE RESULTS

Our production measurement tools achieve better results. Detailed information helps manage performance, boost participation, and target specific areas for coaching and learning. Whether you are interested in measuring quotes or sales activity, we can provide you with the reports you need.

Our monthly reports are available for Credit Life and Disability Insurance, Debt Protection, GAP, and MBP. We track at the financial institution, branch, loan officer, and call center levels. All reports are professionally formatted and easy to read.

SALES CULTURE SUPPORT

Allied supports your financial institution brand and culture. We advocate for your institution’s culture change, not through a seminar or class, but through on-going reinforcement of management’s direction with the program. It has been proven that things learned in an event are lost over time. A proven process will change behavior and typically improve overall results by up to 25%.

LENDING SOLUTIONS

We offer a comprehensive Loan Forms Program which we design to fit your lending operations, improve service, and increase income. This program (available through Securian Financial Group) includes the following five areas: Consultation and Customization, Implementation, Training, Compliance, and Ongoing Support.

Allied provides state of the art quoting tools for both the lender and the borrower through our iQQ[®] quoting tool and our iQQ[®] consumer web site.

CONTACT US

Contact Us For more information on how Allied Solutions’ Client Development experts can impact your business, call our regional management at 1-800-826-9384. Western Region — Sherry Deeds, ext. 55195; Midwest Region — Karen Worke, ext. 55259; Northeast Region — Trish Delaney, ext. 55196; and Southern Region — Koren Wylie, ext. 24130.

