

# LET'S TALK

## Access Control for Bank Equipment

If you are like most organizations, you are continuously battling dual control and appropriate staffing to support it in your branches. What if you could achieve dual control without worrying about assigned combinations and keys? What if you could centralize access control management across the company or even outsource it?

### Introducing **Secure Access**

by Extraco Consulting & Extraco Technology



Simplify your staff scheduling, eliminate manual access logs, save time required to gain access and centralize management. **SAVE** hours of labor costs associated with cumbersome access processes. A case study conducted at our affiliate bank, Extraco Banks, proved savings in excess of 86 employee hours per month in Retail alone. Let us help you estimate your savings based on your size and technology.

#### *OVERALL BENEFITS DERIVED FROM THE SECURE ACCESS INCLUDE:*

- **Affordable all-in-one solution** from the same vendor simplifying support
- **Centralized user and profile management** with the ability to establish granular access controls
- **Ability to enforce Dual Authority and Two-Factor Authentication** integration with Cash Safes and Cash Recyclers
- **Real-Time visibility** to all Alarm Panels, Areas, Doors, Devices (Motion Detectors, Door Contacts, Sensors, etc.) and their associated events
- Fast and simple **point-and-click control**

#### *BENEFITS CONTINUED:*

- **Ability to setup operator profiles** defining specific rights and access permissions
- **Easy-to-use interface** makes for simple system configuration and user permission management
- **Automation rules**
- **Interactive floor plans** that allow you to graphically identify the location of each device for both documentation purposes and control
- **Ability to identify issues and enforce company policies** before they become a problem

Equally important is the improvement to both the employee and customer experience. Delays frequently experienced under current inefficient processes for dual control activities are practically eliminated. This allows managers and employees to redirect their energies towards value-added activities for both the organization and customers.

*So, let's talk!* **SCHEDULE A DISCUSSION WITH OUR TEAM TODAY!**

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# BUSINESS SERVICES FOR FINANCIAL INSTITUTIONS

## BUSINESS SERVICES

- Designing and Implementing Small and Large Networks
- Structured Cabling
- Hosted Phone Systems
- Server Hosting Services
- Office 365 Solutions
- Help Desk Support
- Monthly IT Support Agreements
- Computer Equipment Leasing
- Hardware / Software Sales
- Antivirus / Web Filter Solutions
- Offsite Backup
- Security Cameras



**Patrick Johnson**  
*President of Extraco Technology*

*License #B14691*

## WHAT OUR CLIENTS SAY

Extraco Technology's staff is **always knowledgeable and prompt** when it comes to our cloud hosted phone system. They provided **a unified communication system** that has been **reliable and easy to use**. I would highly recommend Extraco Technology for a turn-key hosted phone solution.

### Caleb Magee

*VP of Operations and Information  
Technology Officer of First National Bank*

Extraco Technology's access control system is **easy to use & integrates with our security camera system**. The team is **very professional, friendly & easy to work with!** I would highly recommend Extraco Technology if looking for a robust access control solution!

### Chad Reinert

*Director of Information Technology  
Hamilton Healthcare System*

PJohnson@extraco.tech  
254.761.2390

# LET'S TALK Advertising

We are a full service agency that offers a variety of advertising services and solutions used to promote products, services, and reputation branding. We have our own in-house graphic design team to implement creative elements for just about anything.

## OUR SERVICES:

- Branding
- Print
- Social Media & Digital
- In-Branch and Out-of-Branch
- Graphic Design

TAILORED SOLUTIONS,  
PROVEN METHODS,  
TANGIBLE RESULTS™

Get Customized Campaigns with  
the appropriate message at the  
appropriate price.

## MARKETING EXTENSION

Use us as an extension to your current marketing department.

## ANALYZE YOUR CURRENT MARKETING

To ensure you are getting the greatest return on your investment and define if there are any gaps that could be filled.

## FULL CAMPAIGN

Let us generate a full campaign launch within your budget.

## MARKET EVALUATION AND CUSTOMER EXPERIENCE FOCUS

Let us research your current market and provide a competitive analysis for product development and guided direction.



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# LET'S TALK

## BSA/AML Consulting Services

At Extraco Consulting, our BSA/AML consultants are current and previous BSA Officers and bankers responsible for BSA and AML programs. Complying with regulations is a serious pain point for most banks and a true headache for Compliance Officers. An effective program requires both resources and planning.

Whether you are needing to create a new program or revise your existing policies and procedures, our team can help you assess your organization's specific needs and create a custom solution.



## Build or Enhance your BSA and AML Program with Guidance from Industry Professionals.

### PROCEDURE AND PROGRAM CONSULTING:

We will review your existing policies and procedures to determine how well they mitigate the specific risks of your institution. We'll look at their compliance strength and how they impact your culture, operations and staffing needs. A review of your systems, manual processes, and any other items that impact your program will further equip us to customize our service deliverables to what you need.

Our service deliverables may include recommendations to update and/or enhance your policies and procedures, new program development, risk assessments, audit remediation recommendations, staff training or other custom deliverables as identified during the evaluation.

### SOFTWARE OPTIMIZATION:

Capturing and analyzing BSA/AML data is the basis for your reporting, monitoring and risk rating efforts. This is a major risk and can adversely impact all of your BSA/AML compliance activities.

Our team will review your transaction sets to ensure all money movement is being captured by your BSA/AML platform. We will team with you to define gaps, define setting changes in your current system or help you identify and implement a new solution that fits your organizations better.

### CUSTOMIZED CONSULTING SERVICES

Whatever your specific needs are, we are here to help! We will work with your leadership to customize your service(s) to exactly what you need and want. There are no "cookie-cutter" solutions at Extraco Consulting.

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# LET'S TALK

## Digital Branch *aka Call Center*

Exceed your customer's expectations of service when they are unable to come into a branch by elevating your Call Center into a Digital Branch. Turn a cost center into a revenue generating production machine.

### OUR PROCESS

- Analyze Call Volume and Employee Skills
- Create Management Routines
- Create Scorecard/Dashboard with Staffing Guidance
- Cultivate Customer Relationships
- Expand Customer Reach
- Create Efficiencies
- Increase Revenues



## DIGITAL BRANCH

### Mirror the Customer Service in Physical Branches.

Financial Institutions must make the most of every customer interaction regardless of how the customer chooses to interact with us. By elevating the capabilities of your call center to match those of the physical branches, a new world of convenience and relationship building will be realized for your customers and greater revenues for the bank or credit union.

### SERVICES AVAILABLE:

- Develop a digital branch from scratch
- Analyze existing Call Center for elevation to a Digital Branch
- Create a scorecard/dashboard for production/staffing monitoring/reporting
- Assess technology needs
- Determine employee skill-set needs
- Establish training routines
- Build training content and delivery methods
- Initiate customized management routines
- Review system access needs
- Conduct process/procedure review for optimal functionality

# CALL CENTER TURNED DIGITAL BRANCH

## CONVENIENCE

Time is a precious commodity and Customers want convenience. Mirror the service provided in your physical branch and increase customer satisfaction by allowing more opportunity to handle needs without the hassle of coming to the branch.

## CULTIVATE CUSTOMER RELATIONSHIPS

When your agents have the same skills as your branch personnel, they will be able to conduct the same relationship building conversations resulting in greater customer engagement and loyalty.

## PERSONNEL EFFICIENCIES

Bankers can be located offsite, either in a centralized workforce pool or remote, and potentially allow the institution to extend its service hours cost effectively.

## PROTECT THE CUSTOMER EXPERIENCE

Nothing is more important than ensuring the optimal experience when a customer chooses to come to the physical branch. Digital Bankers can support the branch network when they possess the same skill set and serve as a floating pool wherever the business need is identified.

## EMPLOYEE SATISFACTION AND RETENTION

When your Call Center is converted to a Digital Branch, the mirrored skill set allows the reduction of stress on physical branches in need of employee support whether it be short-term relief for a call-out, long-term support for a leave of absence, or permanent placement when you have turnover. Floating responsibilities will improve the experience for those digital bankers that enjoy face-to-face interactions but do not necessarily want to be permanently placed in a physical branch.

## INCREASED REVENUE

Digital Branches become production/revenue centers as opposed to a cost center.

## AND MORE

A digital branch can serve as a training center where skills are developed in a more efficient and friendly manner than traditional on-the-job training while still producing. Additionally, the digital branch can serve as support to the branch for a variety of needs including, but not limited to: handling disputes and other lengthy processes to allow for efficient branch staffing; operational support as deemed appropriate such as limit increases to potentially extend service hours; serve as a resource for branch bankers' questions; and much more.

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# LET'S TALK

## Customer Information Files

Inaccurate Customer Information Files (CIF) can cost your Financial Institution **15 to 25% of revenue per year**. Along with revenue implications, it also poses a risk for fraudulent activity. Extraco Consulting has partnered with Redi Enterprise Development to bring you **CIFocus**, a CIF cleansing platform.

*A CIF DATA CLEANSING PLATFORM HELPS:*

- Create Efficiencies
- Improve data quality & overall productivity
- Avoid misguided decision making based on inaccurate data
- Streamline customer communication – accurately
- Enable enhanced management of the client relationship
- Filter irrelevant data or poorly formatted data sets
- Ensure compliance & regulatory requirements



Data Quality = Profitability  
**AUTOMATING ACCURACY**

### **AUTOMATING DATA HYGIENE**

We enable you to deploy usable, accurate data across multiple channels used to communicate and notify your customers or members — such as a CRM, an Online Banking platform, a Fraud Prevention platform, a Mortgage platform, or an Insurance platform from start to finish.

### **GET IT. CLEAN IT. PUSH IT BACK INTO THE CORE.**

We integrate CIFocus into your daily procedures automatically so that you are never running with unvalidated data. However, you may choose to enable the service monthly, bi-yearly, or yearly. We leave the decision of clean data up to you.

**Bridge the Gap** between your data and your customers.

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# TAKING THE WORK OUT OF DATA CLEANING

**CIFocus** provides automatic data correction for a hands off method to data cleaning.

## DEDUPING DATA

CIFocus locates and removes or merges duplicate records.

## MERGING DATA ACROSS MULTIPLE PLATFORMS AND APPLICATIONS

CIFocus cross-references missing data across multiple platforms/applications, then extracts and supplies data to missing fields.

## PHONE

CIFocus verifies phone numbers against carrier records to identify if a number is a cell phone or land line. Data is then aligned for text or call use for penetration in the mobile space.

## EMAIL

CIFocus scans against domains to ensure the address is deliverable and properly formed. It then identifies that the mailbox actually exists.

## CIF ALERT

CIFocus can place a CIF Alert Message on the inaccurate customer/member data so that any future encounters with the customer/member can be managed accurately.

**A streamlined approach** to identifying and correcting data that is inaccurate or missing.

### 01

CIFocus utilizes carrier records, domain/mailbox/catchall, and national data bases to identify inaccurate data.

### 02

CIFocus adds an inaccurate and missing data alert to the CIF for your financial institution's representative to correct data when customer visits/contacts institution.

### 03

Campaign pieces can be delivered to available contact data and mediums to acquire correct/updated information. Campaign items include post card, email, text, online banking ads, and more.

## Data Maintenance

After your initial data cleaning, it's important to maintain an accurate database. CIFocus will allow you to automate the data cleansing process. There's no limit on seats, licenses, or participant access.

Powered by:



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# LET'S TALK

## Customer Onboarding

A disproportionate amount of customers abandon your products and services because they get lost, don't understand something, don't see the value, or simply lose interest.

Focusing on an appropriate onboarding process can minimize customer abandonment and neglect through engagement stages when and where it counts.

### OUR PROCESS

- Dynamic Statements
- Interactive Personalized Video
- Automated eMails
- Automated Text
- Automated Direct Mail
- Customer Retention Unit
- Social Media

It cost 5x's More to acquire a new customer than to retain, and grow the profitability of an existing customer.



## Clear Starting Point. Clear Destination. MAPPING THE JOURNEY

### 72 DAYS TO CONNECT.

Customers move through their onboarding journey at different speeds and different times. One thing is for certain, if you've not started courting them through an onboarding process early in the relationship, the relationship becomes tainted by day 72.

Recalculating your customer's change of direction.

### A CHANGE OF DIRECTION IS CERTAIN.

Your onboarding process should entertain both agility and flexibility. As life changes, so will your customer's desired outcome with your institution.

### THE EXPERIENCE IS AS IMPORTANT AS THE OUTCOME.

Each drip, each touch point you integrate into your onboarding process should be on purpose and fun.

# UNDERSTANDING YOUR CUSTOMER INTERACTIONS

In reality, customer interactions are defined in three ways:

- Customers who have low to no engagement with you or your products
- Customers who have average to high engagement with you or your products
- Customers who are growing exponentially

By sub-categorizing your customer segments in this way, you can quickly determine whether you are your customer's PRIMARY bank or whether your customer has a PRIMARY banking relationship elsewhere.

For customers who are new to your institution, your main goal should be to help them achieve their desired outcome — which is why they pursued you in the first place. You should nurture this relationship and keep yourself open to their needs and change of direction.

For customers who are using you as their PRIMARY institution, this is the time for you to cross sell and discover their life's journey. This segment of customers are advocates of your brand and would make great referring partners. They are the customers you engage in your new releases and technology upgrades.

For customers who are in the GROWTH category, it's time for you to focus on their life stages and cater to their lifestyles. Instead of selling a product, you should sell a life stage. You can do this through surveys and dynamic digital onboarding. An example may be: **Tell us your future goals.**

## Low to No Engagement

You **are not** the customer's primary bank.

**01** | Onboarding should focus on helping the customer **achieve their desired outcome.**

## Average to High Engagement

You **are** the customer's primary bank.

**02** | Onboarding should focus on cross sell, upsell, and growth discovery to help the customer **achieve their desired outcome.**

## Customer Growth

You **are** the customer's primary bank.

**03** | Onboarding should focus on life stages and life style to help the customer **achieve their desired outcome.**

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# LET'S TALK CX Sales Training

Customer experience and relationship building sales training is critical to every organization. Without a strategy behind your team, they are left to their own way of communicating your products, services, and cultural values to your customer. Are you sure their way is your way?

*Training to help support your Human Resources Team, Training and/or Mentoring Staff, and your Retail Sales Team.*

Award-Winning  
Sales Model

Train-the-Trainer  
Certification

Tailored  
Agenda

Customized  
Training

Editable Material  
Available

## Sales Training | Train-the-Trainer

Learn everything we've learned over years of developing our award-winning sales model, supporting Universal Banker and the customer's appropriate experience.

### *EACH PROGRAM INCLUDES THE FOLLOWING:*

- Two full days of training (with certification)
- Trainer's Manual with scripted teaching guide
- Interactive participant workbook
- Training session PowerPoint
- List of recommended supplies
- Electronic files (PDFs) for all session materials
- Ice breakers/games to reinforce course content
- Role play exercises to practice the skills being taught
- Facilitation best practices for optimal cultural adoption

### *PRICING:*

\$2,499 for first attendee

\$1,799 for additional attendees

*Two full days of training in 2 comprehensive, turn-key training programs, including all materials.*

### *ADDITIONAL OPTIONS:*

\$750

*Customized content including but not limited to your products, services, policies, and procedures.*

\$1,250

*Customized training material that is editable by your team. Documents available in Microsoft® Word or Microsoft Publisher and Microsoft PowerPoint.*



# CUSTOMIZED TRAINING

## Series I | Customer Service

### A Superior Customer Experience

Comprehensive employee awareness of all internal and external forces that affect the customer experience and how to manage that experience, despite the uncontrollable forces.

### Customer Service Etiquette

Customer service 101 can be used with employees new to customer interactive roles or as a great reminder of the basics for tenured employees. Everyone will benefit from this course that includes face-to-face, phone, and written etiquette, including handling irate customers and call control methods.

### Adapting Communication Style

"The customer is always right" including their preferred style of communication — teach your employees to recognize and adapt their communication to their customers using the DISC method, combined with generational expectations as a foundation.

## Series II | Sales Training

### Relationship Building Model

Understanding the difference between a salesman and an advisor is critical to gaining trust and expectations. This training module teaches your staff how to move your customers through a step-by-step sales model focused on building relationships and providing solutions rather than selling products.

### Effective Profiling: A Sales Tool

Know the right questions to encourage customers to share their needs so your sales team provides the best solution fit to enable retention. This module supports meaningful conversations with customers to build greater relationships. It adapts proper listening skills, ensuring employees are recommending the best solutions to meet the customers' needs and expectations.

### Overcoming Customer Objections

This methodology equips your sales team to respond properly while successfully overcoming customer objections. Your team will be able to identify the underlying reasons for an objection and establish methods that are appropriate to negate the objection and steer the conversation back to a successful sell or referral.

### Networking for Success

Whether your sales team members have a natural gift for gab or are terrified by small-talk, our easy-to-use networking strategies will create a dynamic sales force when interacting with the community outside of the office.

### Creating Bond and Rapport

Customer loyalty should be placed on your sales team with whom your customers interact. To ensure your team makes the most out of every customer interaction, our sales tool helps your team create a greater bond and rapport with your customers while establishing interactive leaders.

### Generating Successful Referrals and Product Champions

This curriculum provides a sense of urgency and purpose for your sales team to understand all product solutions offered by your institution, not just the products they are personally responsible to sell.

### Turning Service into Sales

Turn basic customer service conversations into need defining opportunities that could result in additional sales or referrals.

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# LET'S TALK

## Dynamic Statements

Customers expect more frequent, meaningful, and personalized communications from their institution. With interactive Dynamic Statements, you have the ability to bring their onboarding experience to life by making it personal.

*A STATEMENT SHOULD DRIVE DIGITAL ENGAGEMENT*

- Statement Consolidation
- Omni Channel Delivery
- Personalizes Onboarding
- Augmented Video Option
- Holistic View of Finances
- True Digital Education



## Enhance Customer Education and Engagement DYNAMIC STATEMENTS

### MEANINGFUL AND PERSONALIZED TOOLS

A Dynamic Document is an immutable, legal statement-of-record that replaces the PDF and HTML static statement transforming it into an engaging educational tool for your: Checking, Savings, Credit Cards, Loans, Business Accounts, etc.

The Ultimate Brand  
Game Changer In  
Digital Documents.

### THE NEXT GENERATION OF STATEMENTS

Because people are mobile, many view their eStatements through their mobile device. Dynamic Statements have the ability to consolidate the entire financial relationship into one notification vehicle, making it easy to view, understand, and set goals.

### CUSTOMER ONBOARDING

Customer marketing that targets post-purchase with the goal of increasing retention and loyalty is made easier when using your institution's core elements such as an eStatement.

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# COMPOSE ONCE. DELIVER ANYWHERE.

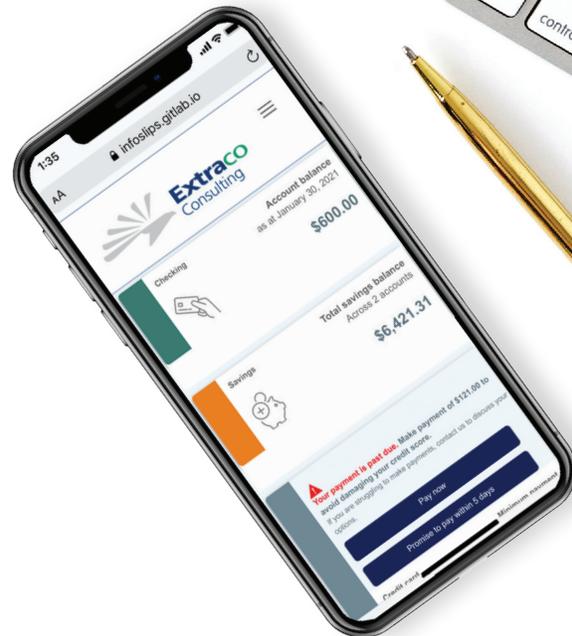
We all know the expense related to acquisition of a new customer compared to retaining an existing customer. That's why building your digital assets into something more meaningful is vital to fueling long-term relationships for retention growth.

## VALUE IN ACTION

What clients really like about the Dynamic approach to eStatements is their ability to include augmented video that is personalized to the customer. Because the video is augmented reality, it allows your customer to change the outcome based on the behaviors they are willing to change or make.

## DEEPENING THE RELATIONSHIP

To deepen the client engagement, dynamic statements will provide customers insights and analytics, while allowing them to measure their own return on investment. The onboarding process becomes intuitive, fun, and purposeful, increasing retention and profitability.

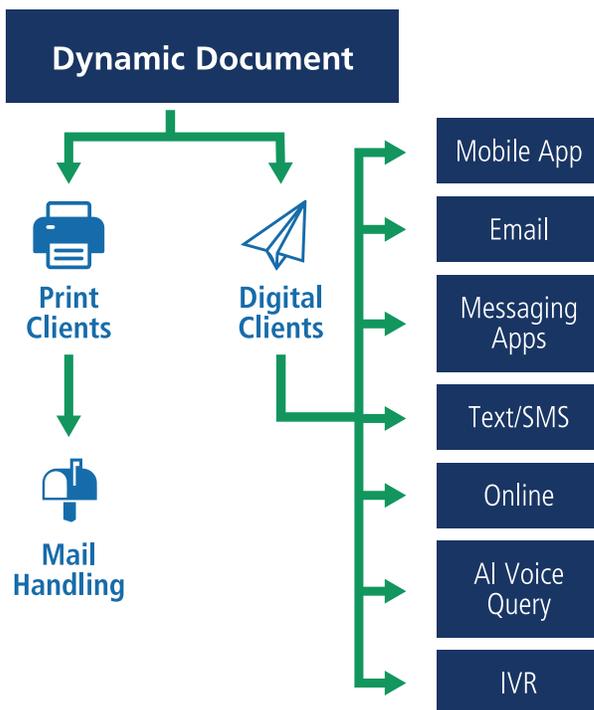


The Dynamic Document revolutionizes communication and delivery of the traditional statement. It creates an omni-channel legally compliant statement-of-record for engagement that is adaptable to any device and can be shared in any form of reference you prefer.

- Mobile App
- eMail
- Text or SMS
- Messaging Apps
- Online Banking
- AI Voice Query
- IVR
- Print & Mail

You are able to seamlessly integrate into payment gateways and dynamically change template assets at composition time such as language, text, video, imagery, and brand.

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# LET'S TALK

## Human Resources

Do your HR practices align with your changing business model to ensure the greatest success from your efforts, increase employee retention and develop a sustainable culture that exemplifies your mission and vision?

### WHAT WE DO:

- Change Management Seminars
- Hiring Practices Including Customized Job Designs
- Recruiting Services, Guidance and Best Practices
- Self-sustainable Training Services including curriculum development available delivered to your staff or as a Train-the-Trainer Certification

## Don't start from scratch when WE HAVE PROVEN RESULTS.

- Maximize project timelines and avoid the stagnating effects of change through highly effective Change Management seminars geared to the appropriate audience: Executives, Officers, or Employees.
- Revise your hiring practices to attract and hire the right employees for success in your new/changing model.
- Adapt/Create job descriptions to match the new skill sets required for any position in your organization.
- Maximize the result of your recruiting efforts regardless of your local hiring pool challenges or retain us to do your recruiting for you.
- Build your employees at all levels through customized training programs to ensure their success.

TAILORED SOLUTIONS,  
PROVEN METHODS,  
TANGIBLE RESULTS™

# OUR PROVEN RESULTS

## CHANGE MANAGEMENT SERVICES

- Executive and Officer Level Seminars offered in full-day sessions addressing fundamental change management principles along with managing and leading change responsibilities and best practices.
- Employee Level Seminars offered in half-day sessions focused on fundamental change management principles coupled with customized WIIFM identification to maximize employee acceptance and commitment.

## HIRING AND RECRUITING SERVICES

- Customized Hiring Routines including interview structure, content and administrative best practices.
- Job Description Review and Guidance including task review, skill requirements, behavioral expectations and recommendations to create growth opportunities through job mastery assessments.
- Assessment of Recruiting Routines along with market demographics to create tailored recruiting solutions and best practices.
- Let Our Recruiters Do The Work for you. We can assist with any level employee.

## TRAINING SERVICES

- Create New or Enhance your existing Sales Culture with our behavioral training solutions: Customer Service and Referral Based Sales Training modules delivered by our talented and engaging trainers or let us train your trainers to deliver.
- Comprehensive Retail Training University curriculum for use with new hires, cross-training efforts and ongoing refresher training complete with administrative routines, success measurement tools and certification best practices.
- Manager/Supervisor Mentor Program to ensure consistency across the branch network for both the employee and customer experience as well as insure the successful transition from contributor to manager with all the necessary administrative routines, curriculum and success measurement tools.
- Leadership Development Programs include options for front-line / entry-level employee development and corporate leadership designed to develop the next generation of corporate leadership.
- Retainer Services to assist with curriculum creation and delivery as desired by the client for any initiatives or behavior support generally delivered quarterly.



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## Interior Design

Custom branch furniture doesn't come from the typical furniture supplier. Unless your architect or contractor's designer specializes for banks or credit unions, they won't take into consideration the design flow of your branch or the Universal Banker Model.

At Extraco, we custom fabricate the pieces around your branch specifications, then ship and install them for optimized use.

### OUR SERVICES

- Lobby Layout and Design Flow
- Quick Transactional Pods
- Custom Built Furniture
- Carpet, Tile, Laminate Furnishings

## The Heart of the Branch, THE UNIVERSAL POD

Teller stations used to be in every Financial Institution providing a safe area for customers to mingle while waiting to be serviced. With the Universal Banking Model becoming the new standard, it's important to establish a warm, friendly, efficient, and professional environment. Choosing a new Universal Pod is a crucial part of the remodeling project.

### ITEMS OF NOTE ON OUR PODS:

- Built to your interior's specification
- Comes with optional ADA shelf
- Hosts a cash recycler and other critical equipment needed to modernize your financial institution
- Makes servicing large/heavy technology equipment easy
- Fits smaller spaces



# BRANCH LAYOUT DESIGN AND FURNISHINGS

Our durable furniture styles range from traditional to modern with a little twist of in-between. We custom build our furniture to your color, style, and size. Whatever you can imagine, we can too. Let us help you layout and design or redesign your next branch for flow and an inviting friendly feel.

We also offer a wide range of beautiful tile, carpet, and laminates in commercial durable grade. You make the selection and we will ship it directly to your contractor overseeing the remodel. This ensures that the design stays in the same color/dye allotment from the manufacturer.

## Engage Us In Your Next Remodel

- Extraco Consulting will host an initial discovery call to better understand your style and market.
- We will layout the flow of your branch focused on the Universal Banker — SWARM Banking™ Model.
- Once the layout has been finalized, we will work with you on selecting interior furnishings such as flooring and walls.
- We will provide you with furniture selections and Universal Pods that are specific to your branch style or a blend to match a repurpose on a partial remodel. This includes your selection of fabrics, paint and laminate/veneer finishes.
- You may also choose to engage us on the interior and/or exterior branding, merchandising, and advertising. From interior/exterior wall wraps, window wraps, ATM wraps, campaign merchandise, signage and more, we are a full graphic design agency with production and installers on staff.



Fabric, paint, veneer, and laminate colors and grade are selected by you.

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PROVEN METHODS,  
TANGIBLE RESULTS™

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# LET'S TALK

## Efficient and Engaging Training Strategy

Do you struggle with the balance between adequate training and costs associated with training your staff? Would you like to improve the results or increase the output of your training resources? Whether you have a trainer, a training department, or utilize on-the-job training mentors, most community banks and credit unions find themselves caught in a never ending hamster wheel of new hire training. Grand ideas of deeper skill development or programs that benefit more than newly hired employees go unrealized due to capacity and/or the costs associated with adding resources.



## Introducing Extraco Consulting's **BANKERSEDU L.M.S.**

### LEARNING MANAGEMENT SYSTEM (LMS) AND CONTENT DEVELOPMENT

We identified a gap in Learning Management platforms. Either the LMS is part of a larger Human Resources platform, which makes them pricey and complicated to achieve ROI, or to support truly engaging content the platforms are expensive, generally too expensive for smaller institutions.

Through BankersEdu, we offer an affordable option with a fully customized and branded site that supports the latest and most engaging forms of online training content. We also provide content development to turn your procedures and existing training materials into dynamic online training.

Let us help you identify what items are best served through online training and free up your training resources to focus on behavioral performance, skill mastery and growing the skills of your existing employees.

#### WHAT YOU CAN EXPECT:

- Support and guidance by Trainers with 20 years of experience in Banking
- Custom Branded Site
- Fully Hosted
- Low-cost annual hosting fee with BIG Features
- On-demand maintenance/content support (pay as you want/need it versus an annual fee)
- Custom content development
- Utilize content you have already developed
- Output of a Full-Time trainer for a fraction of the cost

**SCHEDULE A DEMO TODAY!**

Contact Us Today: 1-888-797-7468 | Visit Us Online: [ExtracoConsulting.com](http://ExtracoConsulting.com)



# ONLINE CONTENT DEVELOPMENT

Our online content development is available in multiple formats and compatible with most LMS's.

## ENGAGING CONTENT

Training is pointless if it is not retained. For this reason, engaging interactive content is the key to maximizing retention by your employees. We utilize a robust authoring tool and content is built by trainers with 20 years of experience in the financial industry.

## TECHNICAL SIMULATIONS

Let us make a screen recording of your system with your procedures and we can make a "how to" video, a practice session where they actually enter the data with prompts to help them learn, and a testing session where they enter data without prompts to ensure understanding of the process.

## BEHAVIORAL AND SITUATIONAL SCENARIOS

Make sure your employees offer the best customer service and/or identify sales opportunities the way you want them to. Branching scenarios that require the employee to choose servicing and/or product choices can introduce or reinforce your service model and help them think through customer interactions to the best resolution. The sky is the limit. These can be quick and simple or lengthy and complicated with immediate feedback to the trainee.

Tailored Solutions | Proven Methods | Tangible Results™

## INTERACTIVE CONTENT

Present information in a variety of interactive ways that require trainee action to move through the learning process. Flip cards, images with hot spots, video, links to activities, knowledge checks and much, much more.

## QUIZZES, TESTS, AND COMPLETION CERTIFICATES

Prove the effectiveness of your training with lesson quizzes and comprehensive tests. Measure the success of your individual trainees with individual dashboards and transcripts. Utilize individual and group reporting. Provide course or unit completion certificates to improve employee engagement and readiness to interact with your customers/members.

## CONTENT DEVELOPMENT BY TRAINERS

Our content developers are trainers from financial institutions. We understand what you need and how to present it for maximum effectiveness. Regardless of what you have (or don't have), our team can assist you with building a program to meet your expectations.

## ON DEMAND AND FULLY CUSTOMIZED

Our content development services are as minimal or comprehensive as you desire. We are happy to begin small with your most pressing needs or create a comprehensive program out of the gate. Let us estimate the development hours for your project and you decide what to build. We'll guide you to the right balance for your budget. Retainers are available to build over time.

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# LET'S TALK

## Process Refinement

Focus on maximizing your banks' unrealized potential and getting the highest performance out of your day with process improvement and optimization.

### OUR PROCESS

- Feasibility Studies
- Process Productivity Assessments
- Gap Analysis
- Custom Process Mapping
- Project Management
- Executive Seminars



The **ExtraCO Consultants** working with clients to reduce inefficiencies using our Process Improvement services are **Lean Six Sigma** certified.



When is the last time you reviewed your process from start to finish?

**STEP 01: SURVEY EMPLOYEES**

**STEP 02: CONDUCT OBSERVATIONS**

**STEP 03: CREATE PROCESS MAPS**

**STEP 04: IDENTIFY OPPORTUNITIES**

**STEP 05: CHAMPIONS PRIORITIZE OPPORTUNITIES**

**STEP 06: BUILD PROJECT AND PLAN TIMELINE**



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# OUR PROVEN METHODOLOGY



## SURVEY EMPLOYEES

Administration and analysis of employee feedback through electronic survey(s) helps define existing practices for processes in the organization. We engage your workforce in the discovery, allowing them to help solve problems and identify easier ways to manage and contribute to the efficiencies you desire.



## CONDUCT OBSERVATIONS

Onsite observation(s) of how processes and procedures are actually being performed by the employees helps uncover areas of inefficiency of working departments. To move the needle, you must first identify why people are doing things the way they are doing them.



## CREATE PROCESS MAPS

Process maps, from start to finish across departments, provide a foundation for how employees get work done. It includes color coding by department for easy distinction of workflow. It provides insight into consistency, potential process improvements, work distribution, accountability, and risk mitigation.



## IDENTIFY OPPORTUNITIES

Identification of opportunities and best practices for process and workflow improvement to gain consistencies and efficiencies. People, technology, tools, facilities, and intellectual property are all assets to your organization. However, few organizations measure the extent to which assets serve their intended purpose. Process refinement helps you identify areas of improvement to clearly balance the assets to support the desired output.



## CHAMPIONS PRIORITIZE OPPORTUNITIES

Facilitation of workshops to support departmental champions in prioritizing recommended opportunities. Once you understand the internal processes of each department you can better align them to the external customer needs.



## BUILD PROJECT AND PLAN TIMELINE

Recommended project plan and timeline to support expedited results and tracking. When organizations operate through strong consistent processes, the cost of goods and services drives visible and sustainable improvement. Process refinement helps organizations improve its cost effectiveness by improving inputs, conversion, people and overhead.

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PROVEN METHODS,  
TANGIBLE RESULTS™



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# LET'S TALK

## Products

Are you looking to refresh the products you offer and service for your customers? Do your current products build engagement, build loyalty, build net income, build retention, build relationships and build happiness for your customers?

*WE CAN HELP IN THESE AREAS:*

- Consumer Products
- Small Business Products
- Commercial Products
- Rewards Products
- Advertising Support for Optimal Results

## PRODUCT DEVELOPMENT

### Is a Simple Concept. Isn't It?

Sound product development is the foundation of every institution and community.

*WE CAN HELP YOU:*

- **Create new value** for customers.
- **Build continued growth** of your institution.
- **Drive customer loyalty and reduce attrition.**

What are you and your institution doing to improve and remove obstacles holding you back from growth? **Let us help.**

Tailored Solutions | Proven Methods | Tangible Results™

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# MAKE AN IMPACT

## BUILD ENGAGEMENT

### Keep It Simple — Our Philosophy

Rewarding the customer for profitable behaviors for your bank is genius. Money is a universal touch point that every age, gender and culture can understand.

## BUILD LOYALTY

### When You Remove the Hurdles

that exist in earning or saving money, you create a REPEAT moment for your customer. Who wants to clip coupons, open an app or take pictures of their receipt to earn rewards? Not us and not your customers either.

## BUILD RELATIONSHIPS

### Cross-selling Should Be on Every Marketing

**Agenda.** The deeper the relationship, the stronger the loyalty, and the greater the profit. It all works hand-in-hand. Let us help you find ways to “sell” without making your customers feel like you are selling – Instead find natural ways to fulfill their needs, making everyone better off.

## BUILD RETENTION

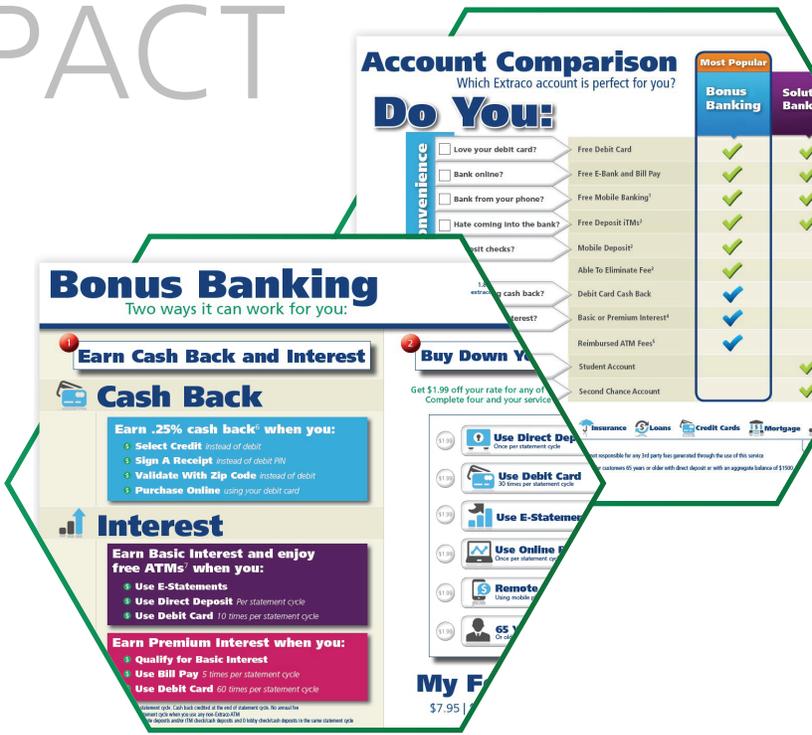
### Build it and They Will Come

Give your customers something easy to use while making/saving them money and they will keep coming back. They'll also tell their friends about it. The better suited your products are to fulfill their needs, the better off everyone will be.

## BUILD RELATIONSHIPS

### Money is a Universal Language, right?

Having a structured, but easy to produce offering incentivizes profitable behaviors for your bank and builds net income, while growing customer engagement. Customers like doing things that are easy to understand, so why not make it beneficial for both you and your customers?



## BUILD HAPPINESS

### We Heard What You Had To Say

Focus groups of current customers and non-customer can be an integral part of understanding your market and finding ways to expand your market share, all while building customer satisfaction. We can help you understand your demographics and develop a targeted strategy to meet your strategic objectives.

Not only do we provide product design guidance, but we go one step further and provide turn-key training options (available to be delivered by our staff of trainers or by your employees certified in a Train-the-Trainer approach) and marketing support. From TV/Radio, print media, sales tools, online and digital to social...we offer it all. Ask us for more information.

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# LET'S TALK

## Site Visits

Spend a full day on-site, with up to 8 Leaders from your organization, experiencing a customized agenda to provide insight into Extraco Consulting's methodologies. Learn how to support your strategic goals and initiatives, **while potentially cutting implementation time in half.** You will gain insight into Extraco's methodologies, experience, implementation plan and best practices regarding all services available.

### EXPERIENCE

- Award Winning Branch Transformation
- Bank-to-Bank Guidance with proven results
- SWARM Banking™



## METHODS IN ACTION

The Proof Is In The Lobby.™  
See It For Yourself.

*Swarm Banking™*

People

Products

Processes

Technology

- **SWARM BANKING™**, is our award winning, retail banking methodology that involves analyzing and reassessing four main components: people, processes, products and technology, to be competitive in today's fast changing banking environment.

- **See it for yourself.** Contact us today to schedule your full-day site visit at Extraco Banks and experience SWARM Banking™ in action. Extraco Banks is a live, working model in today's new banking environment.



“ We attended the Fiserv National Conference and several of their sessions were on the subject of branch transformation. I was amazed to find that we are SO much ahead of the game, primarily due to Extraco Consulting’s help, knowledge and guidance. Wow. Thank you for the amazing leg up Extraco Consulting! ”

**Frank Sexton** *Chief Operating Officer of New Peoples Bank*

## PEOPLE

A bank’s customer experience hinges on the effectiveness of the employee experience. See our people in action during a site visit and learn about our creative and practical approaches on how we hire, train, retain and develop internal talent. We offer customized approaches for our clients to enhance your human capital in all areas. Your people component is the most critical component, because your employee experience drives your customer experience.

## PRODUCTS

Learn how you can streamline your product offerings to complement the wants and needs of your customers. All of our products were influenced by customer feedback. Learn how you can simplify your products and support a successful delivery to your employees and customers.

## PROCESS

Your processes must be simple, fast and fun in order to successfully deliver a superior employee and customer experience. We can help you assess and align your processes to complement your strategic goals and initiatives.

## TECHNOLOGY

We can show you how to push the limits of existing or new technology to provide fast, accurate, and easy-to-use services for anyone seeking bank access at any given hour of the day. Learn how you can decrease your cost per transaction; increase customer touch-points, all while providing a superior customer experience across all channels.

## CUSTOMIZE YOUR SITE VISIT

- Universal Bankers
- POD Banking
- Cash Recyclers
- Digital Delivery Channels
- Virtual/Video Tellers
- Employee Change Management
- Customer Change Management
- Hiring & Training
- Process Improvement
- CRM Best Practices
- Centralized Operations
- Market Research
- Focus Groups
- Effective Marketing Strategies
- Innovation Routines
- Call Center Shadowing
- Branch Layouts
- Process Refinement

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# LET'S TALK

## Transformation of Your Branch

Extraco Consulting doesn't only understand the banking business, we are bankers first and foremost with vast experience adapting to the changing environment successfully.

### WHAT WE DO:

- Create Efficiencies
- Improve the Customer Experience
- Minimize Physical Space
- Maximize Capital Investments
- Utilize Non-Traditional Delivery Channels to Enhance the Lobby Experience
- Generate New Revenue Streams

## Transformation of the Overall Banking Business Model

The quality of the branch experience, which directly influences the customer experience and sales production, is driven by the quality of the frontline employees, and the tools that can help them provide enriched, consistent and personal interactions with customers.

### OUR MODEL AND METHOD FOCUSES ON:

- Award Winning Branch Transformation Strategy
- Lobby Layout Assessment and Recommendation
- Customer Traffic Flow Analysis and Guidance
- Process/Workflow Analysis and Guidance
- Technology Analysis and Recommendations
- Delivery Channel Analysis, Design and Guidance
- Recycler Implementation, Training, and Balancing Guidance
- Employee Education/Training
- Video Teller Implementation, Balancing Guidance and Training
- Customer Change Management and Education





# A Holistic Approach to Branch Transformation

SWARM Banking™:



“Of all the banks Celent has researched, Extraco Banks may best illustrate the cultural, technical, and physical transformation needed to address today’s challenges.”

**Bob Meara** *Senior Analyst, Banking Group - Celent*

## SETTING THE DIRECTION

- Strategic Planning
- Organizational Structure
- Branch Transformation Strategy
- Project Plan Development
- Project Management and Support
- Change Management Seminars

## REFINING PROCESSES

- Retail Job Description Guidance
- Retail Hiring Process Guidance
- Retail Frontline Process Refinement Guidance
- Innovation and Continuous Improvement Routine Assessment and Recommendation
- Retail Compensation and Incentive Plan Evaluation and Recommendation
- Customer Feedback and Satisfaction Routines
- Customer Retention Review and Recommendation

## REMOVING BARRIERS

- Lobby Layout Assessment and Recommendation
- Product Review and Recommendation
- Marketing Assessment and Recommendation
- Customer Education and Change Management
- Alternative Delivery Channel Development

## BUILD YOUR PEOPLE

- Customer Experience Training
- Relationship Building Sales Training
- SWARM Banking™ Certification and Pilot Assistance
- Customer Change Management Workshop
- Customer Education Best Practices Workshop
- Retail Management Routines and Best Practices
- Manager/Supervisor Mentor Programs
- Leadership Talent Development Programs
- Reward and Recognition Assessment and Development

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# LET'S TALK

## Video Banking

There is no substitute to talking to customers when they need face-to-face help with their finances. Video banking provides secure personalized service of a knowledgeable banker with full self-service technology.

### OUR PROCESS

- Feasibility Studies
- Create Efficiencies
- Provide Personalized Service
- Cultivate Customer Relationships
- Expand Customer Reach
- Automate the Branch

## PERSON-TO-PERSON Help with finances.

Banks can no longer afford to view digital channels simply as a mechanism for low-cost transactions. Video banking provides a convenient and effective option of interacting and engaging in a person-to-person connection with customers.

### EACH PROGRAM CAN INCLUDE THE FOLLOWING:

- Face-to-face video assist with a live banker
- Cash a check to the penny
- Make a deposit or a withdrawal
- Transfer funds
- Make loan payments
- Process draw requests
- Self-serve or full-serve option
- Open/close a debit card dispute
- Change PIN
- Debit Card is not required when using Video Banking



# RETHINKING THE ATM

## CONVENIENCE

Customers like convenience and they like to multi-task. Video Banking allows them to manage their more difficult transactions without ever leaving their car.

## BRANCH AUTOMATION

Using technology to increase efficiency and extend reach is a prime reason to consider Video Banking.

## CULTIVATE CUSTOMER RELATIONSHIPS

It goes a long way to making banking personal again. The Video Banker actually makes face-to-face dialogue easy and allows you to hold an interactive conversation with your customer for greater engagement and loyalty.

## PERSONALIZED SERVICE

Connecting the customer with a live banker takes the fear out of using technology.

## PERSONNEL EFFICIENCIES

Bankers can be located off site in a centralized workforce pool and potentially allow the bank to extend its service hours cost effectively.

## AND MORE

Video Bankers can also help with a variety of other customer service needs. Customers can ask questions, update their contact information, perform transactions without their debit card, and more.

The personal touch of video assist makes the drive through experience that much more appealing.



**WATCH THE NEXT STAGE OF  
BRANCH TRANSFORMATION**

Visit [tiny.cc/ExtraBanker](https://tiny.cc/ExtraBanker) to  
see video banking in action.

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# LET'S TALK

## Web Development & Hosting

Your website plays a huge role in how successful your business is online. The whole point of having a website is so that your audience can take a specific action or research your product. However, unreadable fonts, graphic issues, and busy interfaces can prevent your website from performing at it's peek. Let Extraco Consulting help.

We help businesses craft stunning sites with broad functionality in any field or industry. And we can give it a secure home that your business deserves.

Tailored Solutions | Proven Methods | Tangible Results™



## SITE HOSTING starting as low as \$50 a month.

### SERVICES AVAILABLE:

- Unmetered space
- Unmetered bandwidth
- Unlimited eMail storage
- Unlimited sub domains
- Unlimited eMail accounts
- Unlimited parked domains
- Automatic site backup
- Search engine jumpstart
- Domain privacy
- SSL Certificate
- Dedicated IP

*Great minds think alike.*

### FREQUENTLY ASKED QUESTIONS

#### WHAT IS WEB HOSTING?

Web hosting is the service that allows businesses to post a website on the internet. Think of the web hosting as your home on the internet where your website and file assets are stored and secured. Extraco's web hosting comes with features that help businesses grow, such as: publishing a website, creating a custom web-based app, file storage, and enhanced search.

#### CAN I MANAGE MY WEBSITE THROUGH ANOTHER AGENCY?

If you are the owner or administrator of a WordPress solution, we can host your site for you. We also offer website maintenance plans that provide you as few as two hours to an unlimited amount of hours per month in updates or revisions to your website.

#### WHY SHOULD I USE EXTRACO CONSULTING TO HOST MY WEBSITE?

We are a full-service agency and can provide all aspects of website development to hosting to paid digital marketing through your site. We will guide you through the process and provide all the moving parts. Just say when.



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ExtracoConsulting.com

**Contact Us Today!**

# LET'S TALK

## Workflow Scripts

Have you decided to utilize workflows to streamline tasks within your organization? Do you have the script authoring expertise on staff to achieve a quick Return on Investment? Is it an efficient use of time to develop scripts that could be purchased and quickly implemented, reserving your internal author's time for items that are not available?

*Extraco Consulting has a variety of workflow scripts available for purchase. Scripts are available for these softwares:*

Enterprise  
Workflow (EWF)

Nintex Workflow  
Cloud (NWC)

Robotic Process  
Automation (RPA)

Our tested and performance verified scripts include tasks such as dispute data collection, commercial relationship documentation collection and digitization, account servicing (such as conversations, address updates, etc.), approval collection (such as wire transfer approvals), automation of support tasks (dormant reactivations, limit maintenance, fee refunds, etc.), and many more!

## PICK ONE OR PICK ALL!

Jumpstart your workflow project with efficient ROI producing scripts and utilize your author costs for items that require greater customization to your culture and processes.

**REQUEST A FULL LISTING OF AVAILABLE SCRIPTS WITH INDIVIDUAL PRICING TODAY!**

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### ADDITIONAL COMPLEMENTARY SERVICES:

- **Identifying and Prioritizing Workflow Development**
- **Writing Workflow Scripts Guidance and Best Practice** (available for EWF, RPA & NWC software users)
- **Workflow Organization Expectation Management** (a workshop for leadership and all departments to ensure your project runs smoothly and set up ongoing culture for continuous improvement utilizing workflow software)

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# LET'S TALK

## Universal Banker Project Manager Training Certification

Our experienced change agents will help establish best practices and overcome implementation hurdles. We will help you identify how to customize the Universal Model to your organization, enabling you to differentiate yourself from the myriad of Universal Banker Models in the industry.

### OUR PROCESS

- Award Winning Branch Transformation
- Bank-to-Bank Guidance with proven results
- SWARM Banking™

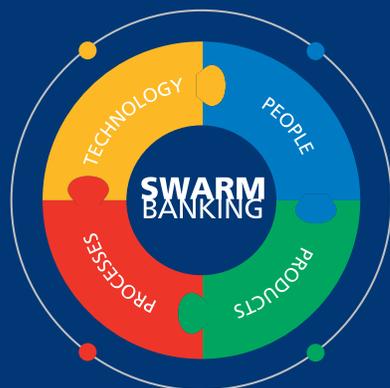
## LET US HELP CUT YOUR branch transformation implementation time in half.

- **Universal Staffing Model**, is more than just cross training.
- **FTE Savings Per Branch** through natural attrition or job and/or departmental reconfiguration.
- **Dramatically Reduce Turnover.**
- **Substantially improve Customer Satisfaction Surveys.**
- **Improved Efficiency** and customer experience.
- **Enhance Employee Career Path** and development.

Training intended for Executive Leaders, Senior Leaders, Retail & Sales Management, Human Resources, and any Universal Banker Change Agents.



# CERTIFICATION WORKSHOP



Train Leadership and Project Managers on successfully implementing a Universal Banking Model.

Swarm Banking™

People

Products

Process

Technology

## WORKSHOP INCLUDES

- **The Importance of SWARM Banking™** and vision of the model
- **Components of the Model** including functional behaviors
- **Universal Banker Expectations** with extensive situational role-play

### PRICING:

\$1,500 for first employee  
\$750 for additional attendees

*One full day of training conducted in Texas designed to educate participants in the basic components that led to the formation of the award winning Universal Banker Model, known as SWARM Banking™.*

## TRAINING MATERIALS INCLUDE

- Interactive Participant Workbook
- Training Session PowerPoint
- Ice Breakers & Games reinforcing course content

### ADDITIONAL CONTENT:

- Participate in a Financial Center Tour to "See the Model in Action"
- Question and answer session

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