



News Release

BAI Holistic Approach to Frontline Performance Helps Financial Institutions Solidify Customer Relationships and Increase Revenue

CHICAGO (October 20, 2009)

BAI, the leading provider of information and intelligence to the financial services industry, is introducing a comprehensive set of resources to strengthen the performance of frontline employees in financial institutions. BAI Frontline Performance Solutions is a collection of integrated offerings that include a wide range of tools and services that are specifically designed to help banks and credit unions assess and develop their retail frontline staff. By improving performance of branch managers, platform staff, tellers and other customer contact personnel, financial institutions will be better positioned to execute their retail strategies to expand customer relationships and improve customer retention.

BAI Frontline Performance Solutions were developed by taking a holistic approach to building an effective frontline workforce. The system is built using five core components that are integrated to optimize performance of customer contact teams including:

- Measuring and enhancing frontline workforce effectiveness
- Assessing sales performance and cultivating a sales culture
- Assessing and developing a coaching-based leadership culture
- Diagnosing retail performance strengths and opportunities
- Gauging customer engagement and building a customer experience

Driving Frontline Performance

Each of these five core components includes a set of tools that have been specifically designed to drive key results. This includes tools such as the sales engagement assessment which measures the attitudes of frontline staff regarding sales and service strategies and cultivating a thriving, sustainable sales culture.



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These findings reveal why sales initiatives may not have produced desired results, and provide valuable insights on how to effectively implement retail strategies at important points of customer contact. Additionally, key benchmark metrics allow banks and credit unions to continually measure and assess performance of frontline staff, while identifying specific opportunities for further development.

This comprehensive approach gives financial institutions a set of tools and resources to optimize the frontline, ultimately providing clearer perspectives on how to better understand business performance and the success drivers. “Workforce development is critical as financial institutions define their retail strategies in order to strengthen their market positions,” says Debbie Bianucci, President and CEO of BAI. “And equally important for BAI, helping the industry drive frontline performance and productivity reinforces our goal of being the financial services industry’s partner for breakthrough information, intelligence and innovation.”

Enabling Workforce Productivity

With this new business offering, BAI expands its value in enabling workforce productivity and performance. Already a leader in regulatory compliance and financial services training, BAI can focus more broadly on another key mission to combine industry knowledge and expertise with powerful tools and solutions to help financial institutions improve employee and business performance.

BAI has joined with other best-of-breed providers to bring this new line of business to the marketplace. Its alliance partners include the Illinois Institute of Technology (IIT), a nationally recognized technological research university with a focused, interdisciplinary approach to education and a dedicated Human Capital practice,, and Richardson, one of the world’s premier sales training and consulting firms. Future partnerships will be announced as BAI continues to expand its frontline offerings.

“Our purpose in developing the BAI Frontline Performance Solutions is to be the primary resource for financial institutions to assess and develop their frontline staff,” says Paul Robert, Director of BAI Frontline Performance Solutions. “This will enable employees with customer-contact responsibilities on the frontline to more effectively execute their retail strategies by focusing on relationship retention and expansion.”



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Upcoming BAI Retail Delivery 2009

To help financial institutions gain a greater understanding of how BAI Frontline Performance Solutions can help drive their retail strategies, Paul Robert will present a workshop at the upcoming BAI Retail Delivery Conference & Expo, the industry's largest gathering of retail financial services decision-makers and more than 200 solutions providers, scheduled November 3-5, 2009 in Boston. The focus of the annual event is to help retail financial service providers reframe the current industry dialogue, create a plan of action for restoring confidence, and define a new value proposition for their customers. For financial institutions who want to learn more about BAI Frontline Performance Solutions and the workshop offered at BAI Retail Delivery, visit www.bai.org/frontlineperformance or contact Paul Robert at (314) 543-2704 or probert@bai.org.

About BAI

BAI is the financial services industry's partner for breakthrough information and intelligence needed to innovate and stay relevant in an evolving marketplace. For more than 80 years, BAI has focused on advancing the industry by offering unbiased education and research. BAI's offerings are as diverse as the industry, and include premier events such as BAI Retail Delivery Conference & Expo, ground-breaking research and performance metrics, professional learning and development programs, and in-depth editorial coverage through *BAI Banking Strategies*. Visit www.BAI.org for more information.

BAI is Bank Administration Institute and BAI Center.

About Illinois Institute of Technology

Illinois Institute of Technology is an international, Ph.D.-granting research university, with world-renowned programs in engineering, architecture, the sciences, humanities, psychology, business, law and design. Established in 1940 and tracing its roots back to the 1890s with the founding of Armour Institute of Technology and Lewis Institute of Humanities, IIT brings a focused, interdisciplinary approach to education, including the Interprofessional Projects Program. Visit www.iit.edu for more information.

About Richardson

Richardson develops customized and comprehensive sales training and performance improvement solutions for sales, sales management, and customer service professionals that integrate with an organization's business strategy, sales challenges, and overall vision to improve sales skills, increase performance, and drive results. The company's 30-year dedication to changing the behaviors of sales professionals and innovation has made Richardson one of the largest global sales training and performance improvement providers today. Visit www.Richardson.com for more information.

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