



PERFORMANCE INSIGHT Big insight for smaller institutions

Performance Insight helps financial institutions with less than \$500 million in assets make smarter, more confident decisions that drive profitability. Our new performance management system lets you harness the power of your financial data to improve your operation and bottom line.

UNCOVER THE SECRETS TO BETTER PERFORMANCE

We turn your financial data into incredibly valuable management information — both point-in-time and trends. Our senior-level consultants will review the reports with you to provide helpful guidance.

USE PERFORMANCE INSIGHT TO:

- Initiate and validate strategies
- Learn which branches and products are most (or least) profitable
- Promote an accountability culture
- Provide actionable information to your board, executive team, and staff

READY TO GO IN ONLY FOUR WEEKS

Our team handles set up, processes data and generates reports with minimal involvement from your staff — and no investment in software or infrastructure. You simply analyze and act.

A NEW PRODUCT THAT'S BEEN 30 YEARS IN THE MAKING

Performance Insight is powered by over 30 years of expertise at The Kafafian Group, one of the most respected financial institution consulting firms in the nation.

We've been helping larger institutions with their performance measurement reporting for decades. Now we've distilled our knowledge and best practices into this service to meet the needs of smaller institutions.

PRICED RIGHT FOR SMALLER INSTITUTIONS

Performance Insight is perfect for your modest budget. It's \$10,000 a year with a nominal one-time start-up expense. It's like having a profitability consultant or in-house management accountant at your disposal for less than \$1,000 a month.

Performance Insight digs deep

- **OUTSOURCED PROFITABILITY REPORTING** Evaluate and measure the profit performance of your entire institution, organizational profit centers, branches and products.
- **FUNDS TRANSFER PRICING (FTP)** Use our proprietary, best-practices approach to FTP for measuring net interest spreads, and the impact on profitability of loan and deposit pricing decisions.
- **COST ASSIGNMENT** Review your expense accounts and apportion them to your organization's profit centers and products. Use the cost assignment techniques and methodologies that we have developed from working with hundreds of financial institutions.
- **CAPITAL ASSIGNMENT AND RISK-ADJUSTED RETURN ON CAPITAL** Focus on the economic value created (or destroyed) by organizational profit centers and products.
- **PEER GROUP REPORTING** See how you perform against other institutions in our database to help uncover issues that may not be evident in the data.
- **CUSTOMER PROFITABILITY REPORTING** Provide customer-level data to feed your MCIF or CRM system, so your customer-facing associates understand the value of each customer to your institution.



Call today to schedule a 20-minute webinar about increasing profitability at your institution through performance management analysis.

**THE
KAFAFIAN
GROUP**

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