

Marketing Consulting

- Segmentation and value proposition development
- Product design and packaging strategies
- Market and branch level marketing plans
- Marketing analytics roadmaps, including identification and vetting of 3rd party partners
- Sales and marketing team alignment through facilitated working sessions
- Integrated marketing communications programs



Deposit product redesign; product pricing analytics; competitive research



FIRST REPUBLIC BANK
It's a privilege to serve you®

Marketing planning; marketing team training; market and segment analytics and research

UNION®

Digital marketing and analytics roadmap; segment-specific value propositions



UMPQUA
BANK

Marketing planning support; marketing and sales team alignment workshops

WSFS bank
We Stand For Service®

Deposit growth workshops for Retail, Commercial, and Private Banking



Mass Affluent value proposition design



Mary Ellen Georgas-Tellefsen
Managing Director
megeorgas@capitalperform.com
917-328-7828



Mark Gibson
Senior Consulting Associate
mgibson@capitalperform.com
508-322-8146