



Management Consulting to the Financial Services Industry

Firm Overview 2023

Who We Are

CPG is a management consulting firm founded in 2001. We focus exclusively on the financial services industry. We have four practice areas:

Strategy

Sales & Marketing

Distribution Planning

Finance/Risk Management

We provide value to our clients by delivering proven solutions to critical business issues, empowering decision-makers with relevant, concise, well-organized information, and engineering work practices to drive efficiencies and productivity.



What Makes CPG Unique

Experience

We are industry veterans. Our full-time professionals and consulting associate team members average over 20 years of experience in the financial services industry as practitioners and consultants.

Focus

We specialize in financial institutions consulting and have developed unique tools and methodologies to address the business issues and challenges that are unique to the industry.

Practicality

We know what it takes to implement and manage strategic initiatives and business model/process change efforts. We provide hands-on assistance and actionable advice.

Insights

It's our job to keep an eye on the competitive marketplace and help you navigate it. Follow us on Twitter, Facebook and LinkedIn.

Results

We help our clients get things done faster and with better results.

Practice Area Leaders

Strategy & Performance Improvement



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Risk Management & Finance



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Strategy & Performance Improvement

Our experienced consultants partner with your teammates to develop and execute strategies to drive growth and sustained profitability and create exceptional, unique companies. CPG's strategic planning process is designed to meet management, board, and regulator needs – and deliver a plan in which all stakeholders have confidence and is a source for internal alignment.

- ✔ Strategic planning
- ✔ Efficiency and productivity improvement
- ✔ Executive/Director meeting facilitation
- ✔ Advanced performance analytics & research
- ✔ Customer segment growth strategies
- ✔ M&A support services
- ✔ Revenue enhancement strategies
- ✔ Customer experience improvement
- ✔ Process reengineering
- ✔ Organizational design



Marketing Consulting

CPG has the industry experience and tools to assist clients with the entire Marketing Lifecycle. We help clients with everything from executive level Marketing strategies to digital campaigns and execution. We use our experience and knowledge to design and develop comprehensive marketing programs that show a true understanding of customer needs, market dynamics, and a return on investment.

- ✔ Digital demand generation campaign and program development
- ✔ Product development and creative strategies
- ✔ Market and branch level marketing plans
- ✔ Digital agency audit, selection, and support
- ✔ Sales and marketing team alignment through facilitated working sessions
- ✔ Marketing technology and analytics roadmap creation, including identification and vetting of 3rd party partners



Distribution Strategy & Channel Management

The growth of digitization has rapidly impacted the way in which customers interact with their financial institutions. Branch transaction volume is declining while adoption and usage of digital channels pushes to new all-time highs. This presents organizations with an opportunity to reduce the high costs of operating physical branch facilities. Yet, in-person advice and human touch remain key differentiators for many in the industry.

- ✔ Branch network optimization
- ✔ Sales & relationship management program design
- ✔ Market entrance strategy
- ✔ Workplace banking
- ✔ Branch site analysis & selection
- ✔ Digital/mobile channel strategy
- ✔ Sales force productivity benchmarking
- ✔ Acquisition, cross-sell, & retention process (re)design

Credit Risk Management & Finance

CPG's professionals work with clients to develop and execute solutions to compete in commercial, consumer, and mortgage lending and manage and monitor the associated credit risks. Our consultants have decades of experience and a current knowledge of best practices, technology platforms, regulatory guidance, and third-party solutions that support the credit function. In addition, CPG assists clients to build more efficient and effective Finance functions and profitability/performance analytics.

- ✔ Loan portfolio reporting & policy issues
- ✔ Balanced scorecards & benchmarking
- ✔ Credit process assessment & redesign
- ✔ Strategic & technology investment evaluation
- ✔ Dual risk rating methodologies
- ✔ Implementation assistance for profitability & financial planning systems
- ✔ Enterprise risk reporting: external risk events monitoring

Some of our Favorite Clients



First National Bank



Recent Articles & Speeches

Survey: Marketers Working Closer with More Business Lines, ABA Bank Marketing, January 1, 2023, by Mark Gibson

Four Key Marketing Trends for 2023, ABA Bank Marketing, January 3, 2023, by Mark Gibson

Unleashing the Power of Customer Data, ABA Bank Marketing, November 15, 2022, by Mark Gibson

Top Banks \$10B - \$50B: How They Outgrew Their Regional Footprints, September 23, 2022, by Claude Hanley

Maximizing the Impact of Data Analytics for Bank Marketers, ABA Bank Marketing Conference, September 13, 2022, by Mark Gibson and John Hanley

Marketing's Role in Data Analytics, ABA Bank Marketing, August 23, 2022, by Mark Gibson

The Top Performing Banks, \$2B-\$10B, American Banker, August 8, 2022, by Claude Hanley

How the Top Community Banks Outperform their Peers, American Banker BankThink, July 29, 2022, by Claude Hanley

ABA Survey: Three Trends Driving Change in Bank Marketing, ABA Bank Marketing, July 12, 2022, by Mark Gibson

The Top 200 Publicly Traded Community Banks, American Banker, May 18, 2022, Research by Shama Patel and Trevor Fox

ABA Survey Shows Bank Marketers are Bank Leaders, ABA Bank Marketing, May 24, 2022, by Mark Gibson

Leveraging Fintech to Improve Relationship Banking, PA Bankers Conference, May 14, 2022, by Mary Beth Sullivan

Growth Opportunities for Midsize Banks, Indiana Bankers Association Mega Conference, May 10, 2022, by Mary Beth Sullivan

More Women in Business Banking Sales Roles: Making it Happen, Pennsylvania Bankers Association Women in Banking, May 2, 2022, by Mary Beth Sullivan

ABA Bank Marketing Budget Survey: Digital Dominates, ABA Survey, April 5, 2022, by Mark Gibson

Using Marketing Analytics to make Smarter Decisions, ABA Bank Marketing, February 15, 2022, by Emma Metzler

What's On the Way for Bank Marketers in 2022, ABA Bank Marketing, January 4, 2022, by Mark Gibson

What are the growth opportunities for community and midsize banks in 2022?, NedTalks Webinar, November 23, 2021, by Mary Beth Sullivan

Email Marketing Success Lessons from the Pandemic, ABA Bank Marketing, September 28, 2021, by Mark Gibson

Management Excellence Wins the Retail Banking Wars, BAI, September 10, 2021, by Rolland Johannsen

Bright Spot Despite Backslide: Our Annual Ranking of Regional Banks, American Banker, July 23, 2021, Research and Analytics by Emma Metzler and Ally Akins

Income is Key: Our 2021 Ranking of Middier Banks, American Banker, July 20, 2021, Research and Analytics by Emma Metzler and Ally Akins





Why CPG?

It takes time to know and trust consultants. We want new clients to grow into long-term relationships. Our success depends on it. We want to be business partners for the long-term, acting as a trusted source for information and support to help our clients achieve their goals.

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