



Management Consulting to the Financial Services Industry

Firm Overview 2025

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.



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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.

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| ✔ 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.

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|---|---|
| ✓ Branch network optimization | ✓ Sales & relationship management program design |
| ✓ Market expansion analytics and new market entrance strategy | ✓ Workplace banking program design |
| ✓ 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



Recent Articles & Speeches

Effective Cross-Sell: The Key to Meeting Deposit and Loan Growth Goals, ABA Banking Journal, March 2025

Segment-Specific Business Strategies: Smarter Ways to Grow, ABA Conference for Community Bankers, February 2025

Why Women are Uniquely Positioned for Leadership Roles, Pennsylvania Bankers Association's Women in Banking Conference, February 2025

The Checking Account Wake-Up Call, ABA Banking Journal, February 2025

Marketing as a Strategic Business Partner, ABA Banking Journal, February 2025

Bank Marketing Budget and Staff Considerations for 2025, ABA Banking Journal, January 2015

2025 Marketing Trends, ABA Banking Journal, January 2025

Economic and Industry Outlook 2025, CPG Publication, November 2024

Quarterly Bank Report 3Q24, CPG Publication, November 2024

2025 Bank Marketing Trends: Date to be Dull – PNC Wants to Break Through with “Brilliantly Boring” Claim, BAI Executive Report, October 2024

BankThink: Helping Seniors Avoid Financial Scams is Just Good Business for Banks, American Banker BankThink, October 2024

Critical Success Factors in Building Your Data Strategy, ABA Banking Journal, October 2024

Modernizing Retail Bank, Marketing and Revenue Opportunities, ABA Bank Marketing Conference, September 2024

Survey: How Bank Marketers are Using Data Analytics, ABA Banking Journal, September 2024

BankThink: Across Asset Classes, the Top-Performing Banks Aren't Those You'd Expect, American Banker BankThink, September 2024

How the Top Performing Banks Rose Above Their Rivals, American Banker Webinar, September 2024

AI for Marketing: The Power of Potential Performance, ABA Webinar, August 2024

How First Citizens Became the Top Performing Big Bank, American Banker, August 2024

Quarterly Bank Report 2Q24, CPG Quarterly Publication, August 2024

Leading Midsize Banks Ride Deposit Strength to the Top of Rankings, American Banker,

July 2024

What Bang do Financial Marketers Get for Their Buck? Financial Brand, July 2024

Top Performing Larger Community Banks Succeeded in Minding the Gap, American Banker, June 2024

Harnessing the Power of Customer Relationship Management, ABA Banking Journal, June 2024

Top Performing Community Banks Made Best of a Tough 2023, American Banker, June 2024

Targeting Non-Profits for Deposits, NedTalks Podcast, May 2024

Revolutionizing Treasury and Marketing, Jack Rants with Modern Bankers Podcast, May 2024

Sales Enablement through CRM: Lifting Performance to New Heights, ABA Banking Journal, May 2024

The Power of Potential: AI for Marketing, NEFMA Spring Conference, May 2024

Quarterly Bank Report 1Q24, CPG Quarterly Publication, April 2024

Unlocking the Potential of Marketing Automation, ABA Banking Journal, April 2024

CPG's Quarterly Bank Report is available on our website

Quarterly Bank Report





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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