



OPPORTUNITIES. SOLUTIONS. RESULTS.



“A brand is no longer what we tell the consumer it is – it is what consumers tell each other it is.”

– SCOTT COOK



Few other industries face the pressures that confront banking today—competition, regulation, technology and economic uncertainty. With these challenges comes the opportunity to create a new environment within your organization, one that casts aside traditional banking confines and ushers in a spirited and engaged business atmosphere.

The sales and marketing development resources of Cross Financial can help you meet today’s challenges. You do not need to be among the country’s largest financial organizations to incorporate the same marketing and management practices that make those firms successful. Cross Financial is an innovative, service-minded firm, committed to giving our clients a competitive edge with access to comprehensive financial sales and marketing management resources.

Every institution has a sales culture. It may not be the one you want, but every institution has one.

BUSINESS PLANNING



Many banks commit time, effort and resources to developing a new culture only to fall short of their expectations because attention was focused only on activities or procedures.

In order to optimize relationship building efforts, there is an underlying need for support systems, teamwork, effective planning and a comprehensive integration of human, physical and financial resources.

Prosperous institutions utilize business and strategic planning to develop leadership, vision and direction. They create internal support systems to insure successful implementation. They nurture consensus and teamwork with a business environment that mandates accountability and encourages leadership. And, they measure performance and communicate results throughout the organization.

“Coming together is a beginning; keeping together is progress; working together is success.”

– HENRY FORD

No matter what stage of development your institution has reached, Cross Financial can help you grow and enhance success with proven programs and resources.

- Strategic Planning
- Competitive Advantage Assessments
- Corporate Goal Setting
- Business Strategy Implementation
- Management Team Surveys
- Director and Employee Surveys
- Market and Product Assessments

CUSTOMER AND MARKET RESEARCH



We help companies understand current customers, potential customers and employees. We examine and track the factors that affect customer satisfaction, loyalty, awareness and purchasing behaviors. Each research project we undertake results in reports and presentations of information that are straightforward and easy-to-use.

- Mystery Customer Programs
- ImageTrac® Customer Satisfaction
- Employee Engagement and Satisfaction
- Image and Brand Assessment
- Advertising and Top-Of-Mind Awareness
- Focus Groups
- Customer Data Profiling
- Post-Transaction Evaluations
- Branch Experience Scorecard

“You can design and create, and build the most wonderful place in the world. But it takes people to make the dream a reality.”

- WALT DISNEY

STAFF TRAINING RESOURCES



Developing competent, highly skilled human resources is essential to companies in a service-based industry. Cross Financial has proven training and education programs designed specifically to communicate with financial institution employees. Each program is customized to meet your training objectives.

- Customer Service and Referrals
- Sales and Relationship Building
- Management, Coaching and Mentoring
- Business Development

ADVERTISING AND CORPORATE COMMUNICATIONS



Banking has unequivocally reached the point where proactive relationship building and effectual marketing are essential to establishing and maintaining a competitive business posture. Developing corporate communications to support organizational goals and objectives is a critical link to achievement and success. Whether supporting an existing brand or creating a new one, advertising and marketing programs have a direct impact on reaching objectives.

“Nobody counts the number of ads you run; they just remember the impression you make.”

- WILLIAM BERNBACH

- Name Development and Logo Design
- Brand Standardization and Management
- Direct Marketing
- Newspaper and Radio Advertising
- Product Brochures
- Newsletters and Corporate Communications
- Point-Of-Sale Merchandising
- Sales Support Materials

PLANNING, SALES AND MARKETING SERVICES FOR FINANCIAL INSTITUTIONS

Are you developing or enhancing your business planning process, examining customer satisfaction or employee engagement, evaluating ways to leverage advertising and branding solutions?

The strategic and actionable solutions from Cross Financial will help you create a well-balanced result. Talk with our dedicated team today - call **402.441.3131** or learn more when you visit **crossfinancial.com**.

