



LINE OF BUSINESS OVERVIEW FOR BANKERS PROGRAM DESCRIPTION

To comprehend the capabilities of your bank and understand how to make a difference, employees across your institution require knowledge of your lines of business, customers that are served and the products and services that are offered.

Performance Solutions International's (PSI's) *Line of Business Overview* provides that understanding and a whole lot more.

LEARNING OBJECTIVES

After completing the *Line of Business Overview*, participants will be able to:

- Describe your institution's mission, values and strategy
- List the major business segments within your bank
- Discuss the key characteristics of each segment and the business units within each segment including:
 - Customers served/targeted
 - Products and services provided
 - Delivery channels utilized
 - Financial performance and contribution to overall revenue
- Define the services provided by key support and corporate functions across the bank (Treasury, HR, Technology and Operations, Finance, etc.)
- Discuss how they can make a difference at your institution



FORMAT AND DURATION OF THE COURSE

The *Line of Business Overview* will most typically be held in a one-day, interactive session. We can also create a half-day session for additional audiences that do not require the comprehensive understanding that can be obtained from the full-day session.

The program consists of a combination of class discussions, case-study exercises (cases focusing on your segments) and a game show to test knowledge of each segment.

Typically the modules are organized based on your line of business structure, for example:

- Retail Banking
- Investment Management and Private Banking
- Corporate and Investment Bank
- Corporate Infrastructure (or Support Units)

The *Line of Business Overview* can also be delivered using distance and online learning approaches depending on your objectives. The entire course is tailored to your specific institution using publicly available information and information you provide to us about your organization.

PSI instructors, knowledgeable about both the financial services industry and your institution will teach the course for you or we can train your trainers.

PROOF OF CONCEPT

Performance Solutions International (PSI) has developed this course for a number of our clients and it has been extremely successful. PSI has also tailored the course specifically for different audiences within our client institutions.

The *Line of Business Overview* program will provide a solid understanding of your institution and help break down the barriers of understanding that exist in larger organizations. Your employees will truly understand the “big picture” and be able to contribute more to help you achieve your strategy.

To contact PSI to get more information on *The Line of Business Overview* for Bankers, please call Chris Lawton at (973) 895-6061 or email at clawton@goto-psi.com.