



# REPRESENTATIVE ENGAGEMENT

## Channel Migration

<b>Client Profile:</b>	<ul style="list-style-type: none"> <li>■ A national commercial and retail bank</li> </ul>
<b>Business Issue:</b>	<ul style="list-style-type: none"> <li>■ Migrate customers to lower cost, high margin or strategically important channels</li> </ul>
<b>Engagement Plan:</b>	<ul style="list-style-type: none"> <li>■ Identify migration opportunities to create financial assessment models</li> <li>■ Define migration strategy to identify obstacles and contingencies to migration</li> <li>■ Manage migration process to accelerate benefit</li> </ul>
<b>Solution:</b>	<ul style="list-style-type: none"> <li>■ Identified customer activities and interviewed product, line, and operations managers to develop migration opportunities</li> <li>■ Developed financial assessment models to provide detailed steady state vs. migration state comparison and a complete revenue and cost reduction analysis</li> <li>■ Coordinated with various functional areas to implement migration strategy and overcome migration obstacles</li> <li>■ Developed final tracking and monitoring mechanisms to closely manage the migration process</li> </ul>
<b>Benefits:</b>	<ul style="list-style-type: none"> <li>■ Projected annualized benefit of \$13.9 million</li> <li>■ Identified and implemented migration opportunities to enhance client retention, increase fee income, and reduce fixed and variable expense</li> </ul>

### RESULTS

Percent Decrease in Usage of Manual/Less Preferred Channels

