



Banking Marketing Strategy Sr. Vice President's Summary of Results

- **Industry:** Banking
- **Results:** In 1 – 2 days, junior bankers made long-term finance and marketing judgments like one of the best banking minds in the country. They solved the bank's liquidity problem and doubled profits within months
- **Critical Issues:** Brain drain due to retirement and inadequate liquidity
- **Job:** Marketing Strategy
- **Problems Solved:**
 - The Sr. Vice President of a Bank's Marketing Strategy Department was ill, going blind and about to retire, taking with him all his valuable reasoning power. This expert had over thirty-five years of banking experience and he was recognized as one of the leading bankers in the United States. He was a well-known economist and the leading strategy instructor at the Bank Administration Institute and the Banking School of the South.
 - The marketing strategy department was made up of very bright novices. Members of the new department needed the expert's reasoning power to correctly interpret and use data about the economy and markets. They also needed his ability to analyze the performance of the bank and its competitors, so they could develop marketing strategies for moving forward.
- **Areas of Expertise:** Diagnosing Economy and Marketplace, Developing Short and Long-Term Strategies and Plans, Analyzing Performance and Determining Corrective Action
- **Marketing Strategy SVP's Summary:** "Within a few days team members were thinking and making decisions as if they were me. As they learned, each member of the department used their emerging reasoning to personalize their own copy of my reasoning power. This enabled them to expand, refine and share reasoning power. They created a plan for changing and reallocating financial resources – loans, the investment portfolio, deposits and purchased funds. That plan solved the bank's liquidity problem and doubled profits within months.

"Enabling those young people to reason and perform like I do when I develop marketing and financial strategies was one of the most rewarding experiences of my career. They changed the future of the bank. I believe there are only ten bankers in the country that can make better, faster and smarter decisions than the talented young banker who was a computer programmer before she used my reasoning power."

Later the software and that expert banker's reasoning power was also used by CEOs and CFOs at a number of affiliate banks. Those bankers were able to quickly personalize a copy of the expert's reasoning power, use it for their organization, and make superior decisions that led to exceptional results.