

About Global Bankers Institute

*Simply the **BEST!*** *Training*
Communication
Consulting

About GBI

- Global Bankers Institute (GBI) is a Training, Communication and Consulting Firm dedicated to the banking, insurance and financial services community with innovative top-quality solutions that provide measurable performance improvement.
- Headquarters in the heart of the financial district in New York at 245 Park Avenue.
- Locations and representatives around the world.

GBI History



Global Bankers Institute

Edcomm Banker's Academy

Sandy Corporation

Arthur Andersen & Co

Dr. Linda Eagle & Clifford Brody: A Partnership

In the Pursuit of Excellence!

30+ Years in the Industry With Over 3,000 Clients Served Globally

GBI Principals

Dr Linda Eagle:

- Founder & President of GBI:
 - Former President of The Edcomm Group Banker's Academy
 - Senior Manager at Arthur Andersen & Co
 - Ph.D. in Business and Psychology

GBI Principals

Dr Linda Eagle:

- Expert in banking:
 - Focused on people, technology and bottom-line results
 - Well-known expert in Fraud and Compliance
 - Published hundreds of articles
 - Keynote speaker and panel member

Clients Served

Examples of Linda's tireless efforts on behalf of her clients have included:

First Gulf Bank

Responsible for leading the team in regionalizing, customizing and delivering a bank-wide curriculum of eLearning and Classroom programs covering everything from soft skills such as communication and leadership, to advanced courses in Credit Risk Management and Trade Finance.

CheckFree

Responsible for leading the team designing and developing an online portal solution to address the compliance training needs of this major money services business (MSB). The approach included self-registration functionality to allow outside remittance agencies to register and manage their own personnel while providing CheckFree with all necessary reports to demonstrate their compliance.

Clients Served

Examples of Linda's tireless efforts on behalf of her clients have included:

Union Bank of California

Responsible for working with Union Bank of California's Management Team to bring a Performance Management culture and methodology to the Bank. Led the Human Capital Performance Improvement (HCPI) Audit – beginning with development of cascading strategic and operational goals, Key Performance Indicators (KPI) and Key Performance Measures (KPM) across all areas of the bank and the development of a comprehensive training plan to address ongoing Human Capital Performance Improvement (HCPI).

Banco Popular

Responsible for bringing eLearning to a traditionally classroom based training practice to meet budgetary requirements without sacrificing quality or employee morale. The results included a sustained 31% boost in sales and a 27% improvement in employee morale.

Clients Served

Examples of Linda's tireless efforts on behalf of her clients have included:

EF Hutton

Responsible for creating and implementing the first training of Wall Street brokers on Ethics in Sales and Marketing Practices in an award winning program called "Yellow Lights." The approach was to focus on "difficult to determine" ethical dilemmas and encourage responsibility on the part of the broker and empowerment of the management team.

Equitable Insurance

Responsible for leading the team of consultants and internal management at Equitable Insurance to bring a Performance Management culture and process to the vast Equitable Insurance Sales Force. By designing a new, custom sales model and Key Performance Indicators and Measures (KPIs and KPMs), and developing and delivering training targeted at the areas where KPMs were below standard, was able to increase sales across all product lines by 23%, while reducing employee turnover by 52% in the first year alone.

Clients Served

Examples of Linda's tireless efforts on behalf of her clients have included:

Junior Achievement	Responsible for the creation of a program to teach instructors in K-12 public schools to introduce computers to their schools. Although this seems almost laughable in 2011, in the year 1982 when this was implemented, less than 1% of all public schools had a computer on its premises.
New York State Division of Taxation	Responsible for leading the team bringing a new system to the 2500 person Division of Taxation. The tasks included training, documentation, newsletters, consulting, focus groups, media management, and public events.
Pennsylvania Department of Transportation (PENDOT)	Responsible for designing internal and external departmental campaigns to successfully launch the first web based interactive system for Drivers' Licenses, parking and moving violations, and car registration. The components included classroom training, computer based training, seminars, self-study, public events, and media coverage .

Clients Served

Examples of Linda's tireless efforts on behalf of her clients have included:

American Bar Association	Responsible for training US based attorneys and UK based barristers on Comparative Communication Analysis for Expert Witness Examination and Cross Examination. The program successfully brought together members of the legal profession from both sides of the pond and resulted in a permanent association as its outgrowth.
The Equitable	Responsible for the implementation of ten products offered by the home office to agents. Heralded as the best product launch in the history of the company.
Fleet Bank	Responsible for reengineering to bring standards for productivity to the unit that performed Internal Revenue Service IRS quarterly processing. The reengineering was followed by productivity training to ensure balance of volume, efficiency, quality and risk.

Clients Served

Examples of Linda's tireless efforts on behalf of her clients have included:

Sallie Mae

Responsible for creating work-flow based reengineering of process coupled with training of all management, supervisory and clerical staff involved in loan origination. The approach included a team-based work effort which replaced the traditional linear work flow.

Al Hilal Bank

Responsible for creating state of the art eLearning and classroom based training for this young modern Islamic Bank, ensuring Leadership and Management styles were consistent across the bank's footprint.

GBI Principals

Cliff Brody:

- Founder & CEO of GBI:
 - Former CEO of The Edcomm Group Banker's Academy
 - Sandy Corporation Management
 - Spearheaded Human Capital Performance Improvement practice at Arthur Andersen & Co (Accenture)

GBI Principals

Cliff Brody:

■ Notable achievements:

- First Human Capital Performance Improvement Dashboard
- First Deployment of Distributed Learning in a Mainframe Environment.
- First Application of Operations Management Theory to a Service Business.
- First Utilization of Interactive Videodisc for Insurance Training.
- First Integration of Participant and Instructor Guides.
- First Arabic (reading right-to-left) Flash Based eLearning.
- First Bi-Lingual Training Content Design.
- First Content Management System for Computer Based Training.
- First Standards for Computer Based Training Screen and Navigation Design.
- First Learning Management System Dedicated to Financial Services.
- First 508 Compliant Financial eLearning.
- First Use of Touchscreens in Financial Services Training.
- First Concurrent Computer Based Training.
- First Satellite Based Distributed Learning.
- First Documentation Management System.
- First Just In Time (JIT) Training for Investment Bankers.

Clients Served

Examples of Cliff's lasting positive business impact he has had on his many clients over the years:

Federal Reserve
Bank of New York

Responsible for leading the design and development of a custom eLearning program for Federal Reserve Bank of New York on Code of Conduct and Ethics Compliance. Worked with Federal Reserve Bank experts to design a creative, educational and easy-to-use program that was delivered across the entire Federal Reserve Bank System.

Citigroup/Citibank

Responsible for leading the design and development of an orientation video to teach new Citigroup/Citibank employees about health care benefits available to them. Directed the creative team utilizing world-renowned professional talent to produce an award-winning masterpiece.

Chemical Bank

Responsible for leading the design and development of Chemical Bank's Sales & Service Strategy. The systems, processes and training Cliff and his team delivered helped bring ChemBank's 250 branch network from simple Transaction Processing to the forefront of sales and customer service quality.

Clients Served

Examples of Cliff's lasting positive business impact he has had on his many clients over the years:

Manufacturers Hanover Trust	Responsible for leading the design and development of a series of videos to provide an orientation to new employees in their massive Trust Services division.
Union Bank of California	Responsible for designing, developing and implementing a Human Capital Performance Improvement methodology and toolset for Union Bank of California. Created the Performance Management Planner (PMP), a computer-based dashboard for defining and managing cascading strategic and operational goals and their supporting Key Performance Indicators (KPIs) in the four quadrants of Volume, Quality, Risk and Cost. For each KPI, Key Performance Measures (KPMs) were defined for current, standard and target levels.

Clients Served

Examples of Cliff's lasting positive business impact he has had on his many clients over the years:

Carteret Savings Bank

Responsible for leading the design and implementation of a training curriculum for new full and part-time bank tellers. Created a self-paced themed program consisting of a video and print guide that presented the training in the "Teller Training Evening News," and included segments on products, customer service, systems, branch security, cash handling, professionalism and more.

First Fidelity Bank

Responsible for leading the design and development of the first Operations Management course for the banking industry. Applied concepts such as: Capacity Planning, Forecasting, Scheduling, Production Standards, Work Flow Design, Pareto Analysis and other productivity and quality tools previously only used in manufacturing to the service sector.

Clients Served

Examples of Cliff's lasting positive business impact he has had on his many clients over the years:

Commerce Bank

Responsible for leading the creation of a bankwide training curriculum to match the Commerce Bank "WOW" customer service vision. Delivered a suite of programs including: Teller Training, Compliance Training, Branch Manager Training, Sales training, Customer Service Training, Lending Training, Leadership Training and Communication Training, that exceeded their every expectation.

US Department of the Navy

Responsible for designing and developing mission-critical training on the Naval Aviation Logistics and Command Information System (NALCOMIS) for the US Department of the Navy. The curriculum included classroom training, on the job training (OJT) tools, and cutting-edge simulation training on a Honeywell mini-computer network.

Clients Served

Examples of Cliff's lasting positive business impact he has had on his many clients over the years:

Arthur Andersen &
Co (Accenture)

Responsible for developing Method E, a comprehensive Human Capital Performance Management methodology and dashboard to be used by the consulting firm to increase revenues and reduce costs on their Human Capital and Change Management projects. Modeled after Andersen's Method 1 systems development methodology, Method E included end-to-end lifecycle Phases, Segments and Tasks and automated tools to analyze and manage all Human Capital Performance Improvement data.

Burns Security

Responsible for a program of ongoing Supervisory Skills training in the "Early Talent Recognition" initiative. The business goals included behavioral skills development as well as talented employee retention, both of which were achieved within six months.

Clients Served

Examples of Cliff's lasting positive business impact he has had on his many clients over the years:

Pizza Hut	Responsible for designing, developing and training Managers and Assistant Managers at 5,000 Pizza Hut locations. The applications included staff scheduling, hut budgeting, and cover projections. This heralded the decentralization of productivity planning tasks to the individual restaurants.
National Westminster Bank	Responsible for creating a series of short tutorials covering all aspects of banking operations including: Loan Operations, Coin and Currency, Statement Processing and Treasury Services.
Riggs Bank	Responsible for designing and developing comprehensive procedures and policy documentation and delivering a documentation management solution to manage it all. The documentation included workflow diagrams, system procedures and a master index for usability.

Clients Served

Examples of Cliff's lasting positive business impact he has had on his many clients over the years:

Maryland National Bank	Responsible for creating bankwide procedures, policies and training for Maryland National Bank's Retail Division. Deliverables included Participant Manuals, Instructor Manuals, Train-the-Trainer (TtT) Guides, Procedures Manuals, Quick Reference Job Aids and Computer Based Training Simulations for Retail Systems Training.
Bank PHB Nigeria	Responsible for leading the design and development of a comprehensive curriculum of courses for Bank PHB - a top tier Nigerian Bank. The curriculum was fully regionalized and culturalized and delivered on a customized Learning Management System (LMS).
Equitable Insurance	Responsible for managing the design and development of an innovative, needs-based sales model and a Dashboard for analyzing and managing Key Performance Indicators (KPIs) and Key Performance Measures (KPMs). Designed a blended curriculum of foundation classroom training combined with Just-in-Time computer-based modules that addressed product knowledge and specific sales skills.

Clients Served

Examples of Cliff's lasting positive business impact he has had on his many clients over the years:

Deutsche Bank	Responsible for creating Anti Money Laundering / Bank Secrecy training for a multi-national audience with shifting responsibilities.
Qatar National Bank	Responsible for bringing Leadership Development and Technical Training to the bank to increase sales and help improve the customer experience.
Guaranty Bank	Responsible for leading the team delivering Guaranty Bank a secure solution for its online training activity to assure regulatory compliance. The dedicated, secure server was deployed in record time delivering critical eLearning training to all bank personnel. Coordinated all intrusion detection testing and secured a SAS70 from Ernst & Young for the architecture.
American Express	Responsible for creating "best in class" customer service training for inbound telephone call center personnel to accompany the introduction of the American Express Platinum Card. The program was based on meeting all needs of the caller on the first call in.

GBI Industries

GBI is proud to serve the following industries:

- ATM
- Branch Banking
- Branch Banking
- Brokerages
- Business Banking
- Capital Markets
- Cash Management
- Clearing Houses
- Commercial Banking
- Commercial Lending
- Compliance
- Consulting
- Consumer Credit
- Consumer Lending
- Corporate Banks
- Credit Card
- Credit Unions
- Deposit Services
- Farm Credit
- Foreign Exchange
- Industry Associations
- Insurance
- International Banks
- Investment Banking
- Islamic Banks
- Legal
- Lending
- Micro Finance
- Micro Lending
- Monetary Authorities
- Money Service Businesses (MSBs)
- Money Transfer Agents
- Mortgage Banks
- Off-shore Banking
- Online Banking
- Operations Outsourcers
- Payment Processors
- Private Banking
- Project Finance
- Regional Banks
- Regulatory Institutions
- Retail Banks
- Savings & Loans
- Savings Banks
- Super Regional Banks
- Supermarket Banks
- Trade Finance
- Treasury Banks
- Trust Banks
- Wealth Management

GBI Training Solutions

GBI offers **BEST!** Training solutions:

- Anti-Money Laundering
- Bank Secrecy Act
- Blended Training
- Branch Manager
- Branch Security
- Business Development
- Cash Management
- Certification
- Children's Programs
- Classroom
- Coaching
- Code of Conduct
- Commercial Lending
- Communications
- Compliance
- Consumer Lending
- Corporate Culture
- Credit Risk
- Cultural Sensitivity
- Customer Service
- Diversity
- eLearning
- Ethics
- Financial Statement Analysis
- Fraud
- Giving Effective Presentations
- Harassment and Discrimination
- Information Security
- Islamic Banking
- Leadership
- Mentoring
- MicroLending Operations
- Mortgage Lending
- Negotiation Skills
- Onboarding/Orientation
- On-the-Job Training
- Operations Management
- Orientation to Banking
- Performance Management

GBI Training Solutions

GBI offers **BEST!** Training solutions:

- Platform Sales
- Portfolio Management
- Problem Solving
- Productivity and Quality
- Project Management
- Records Management
- Relationship Management

- Relationship Selling
- Sales and Service
- Seminars
- Simulated Systems Training
- Supervisory Skills
- Systems Training
- Teller

- Train-the-Trainer
- Treasury Risk
- Wealth Management
- Webinars
- Workplace Safety

GBI Communication Solutions

GBI offers **BEST!** Communication solutions:

- Advertising
 - Crisis Management
 - Cross Cultural Communication
 - Customer TouchPoints
 - Documentation
- Investor Relations
 - Marketing
 - Media Consulting
 - Motivational Programs
 - Multimedia Development
 - Publicity/Media
- Recruitment
 - Sales Incentive
 - Video Production
 - Web Site Design
 - Workforce Development

GBI Consulting Solutions

GBI offers **BEST!** Consulting solutions:

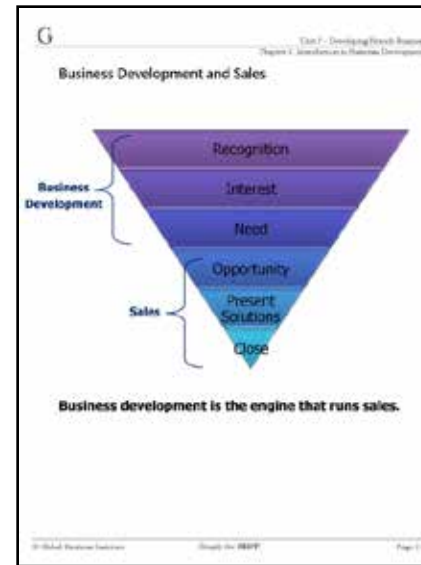
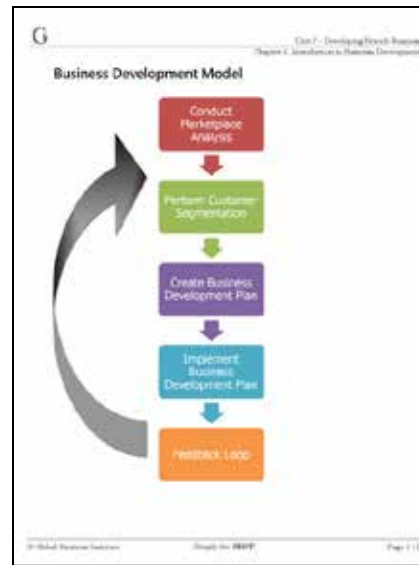
- Career Mapping
- Cascading Goals
- Competency Mapping
- Compliance Audit
- Continuity Planning
- Corporate Governance
- DeNovo Banks
- Gap Analysis
- Human Capital Performance Improvement

- Key Performance Indicators
- KPI Dashboard
- Key Performance Measures
- Marketplace Development
- Outsourcing
- Performance Audit
- Performance Management
- Product Development
- Production Standards

- Professionalism
- Quality Assurance
- Reengineering
- Risk Assessment
- Security Planning
- Sustainability
- Training Needs Analysis
- Training Value Analysis

GBI Quality

GBI provides quality materials for all solutions:



SWOT Analysis

The first step in analyzing competitors is to identify the competitor's internal strengths and weaknesses and their external opportunities and threats.

Strengths	Weaknesses
<ul style="list-style-type: none"> Clear reputation Strong customer service culture 	<ul style="list-style-type: none"> High for attrition Development branch opening times
Opportunities	Threats
<ul style="list-style-type: none"> Established lower branching sites in the market Large, more customer market share 	<ul style="list-style-type: none"> New foreign banks entering market New compliance requirements increasing operational costs

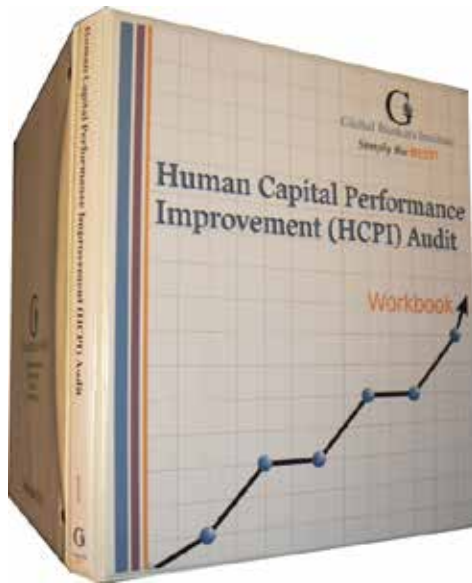
"Competition always seem to be ready to compete, to move when you take a step, and to counter you for. The constant to be found in our relations or conflicts about you at all, but general trading has not a business before all the time. Investments that give the development and improvement do not die. They have a business made by the market, which is before it has reached perfection, and tends to the making the production, improvement, or development of it later."

Henry Ford

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GBI Quality

GBI provides quality materials for all solutions:



G Key Performance Indicator Definition

Directions: Use the following worksheet to identify key performance indicators for each operational goal.

Operational Goal	KPI
Key Performance Indicator	01.1
Key Performance Indicator	01.2
Key Performance Indicator	01.3
Key Performance Indicator	01.4
Key Performance Indicator	01.5
Key Performance Indicator	01.6
Key Performance Indicator	01.7
Key Performance Indicator	01.8
Key Performance Indicator	01.9
Key Performance Indicator	01.10

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G Key Performance Matrix

Directions: Use the following worksheet to define key performance metrics for each key performance indicator.

Key Performance Indicator	Key Performance Metric
Operational Goal	01
Key Performance Indicator	01.1
Key Performance Indicator	01.2
Key Performance Indicator	01.3
Key Performance Indicator	01.4
Key Performance Indicator	01.5
Key Performance Indicator	01.6
Key Performance Indicator	01.7
Key Performance Indicator	01.8
Key Performance Indicator	01.9
Key Performance Indicator	01.10
Key Performance Indicator	01.11
Key Performance Indicator	01.12
Key Performance Indicator	01.13
Key Performance Indicator	01.14
Key Performance Indicator	01.15
Key Performance Indicator	01.16
Key Performance Indicator	01.17
Key Performance Indicator	01.18
Key Performance Indicator	01.19
Key Performance Indicator	01.20

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G Operational Goals

Directions: Use the following worksheet to identify and define the organization's strategic goals.

Strategic Goal	Operational Goal
Strategic Goal	01
Strategic Goal	02
Strategic Goal	03
Strategic Goal	04
Strategic Goal	05
Strategic Goal	06
Strategic Goal	07
Strategic Goal	08
Strategic Goal	09
Strategic Goal	10
Strategic Goal	11
Strategic Goal	12
Strategic Goal	13
Strategic Goal	14
Strategic Goal	15
Strategic Goal	16
Strategic Goal	17
Strategic Goal	18
Strategic Goal	19
Strategic Goal	20

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Our Philosophy

- The Global Bankers Institute Philosophy:
 - A customer-centric approach reflected in every project.
 - No surprises - on time, on budget, on point delivery of every solution.
 - Communication and collaboration are the basis of our partnership.

Our Money Back ROI Guarantee

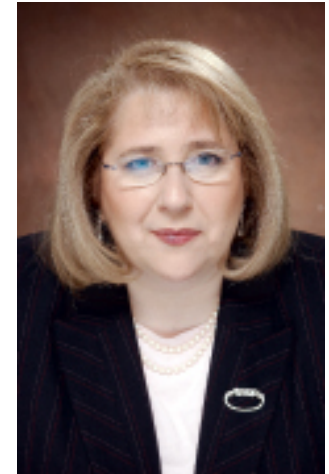
- Our GBI Money Back ROI Guarantee:
 - GBI will measure and demonstrate Business Results for any training program we deliver.
 - GBI will meet ROI targets or we refund your fees.
 - GBI is proud to introduce this innovative approach to ROI - the first of its kind in our industry.

Our Pledge

Global Bankers Institute brings experience, innovation and value, providing the **BEST!** Training, Communication and Consulting solutions to the financial services industry.

We pledge:

- GBI will deliver the finest quality solutions you have ever used.
- GBI will deliver the most exemplary service you have ever experienced.
- GBI will measure and demonstrate positive return on investment.



Please let us know how we may best serve you:

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