

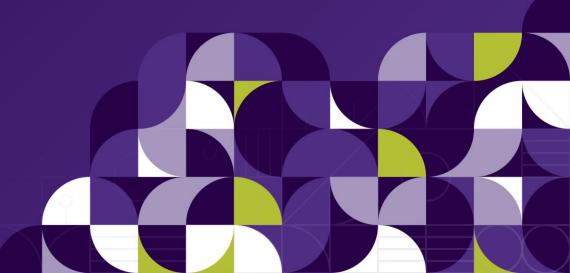
Breaking Barriers

Removing the Hurdles of Experience Transformation

VISIONARY OICES 2025

Presented by Mike Forsyth – Director of Transformation Strategy

678-708-5889 - mforsyth@dbsi.com



Roundtable Discussion

Have you encountered this barrier, and how have you addressed it?

What in your mind is a better way to overcome this barrier?

What expected impacts to Staff or Client Experience will this produce?



WHAT GETS IN THE WAY?

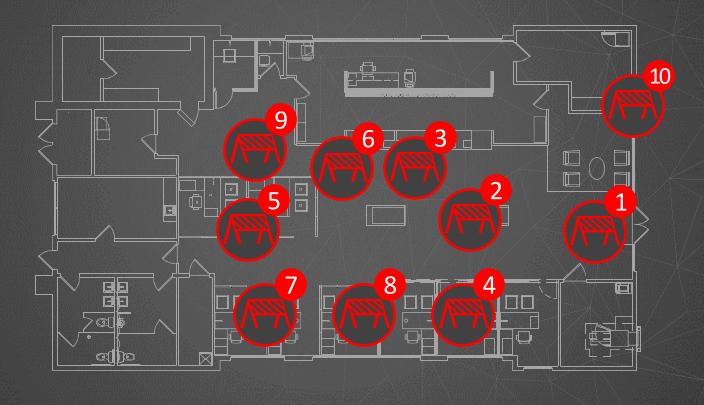
FIRST IMPRESSION

ENGAGEMENT

WAIT TIMES

PEOPLE CHOICE

PROBLEM RESOLUTION



COLD TRANSITION

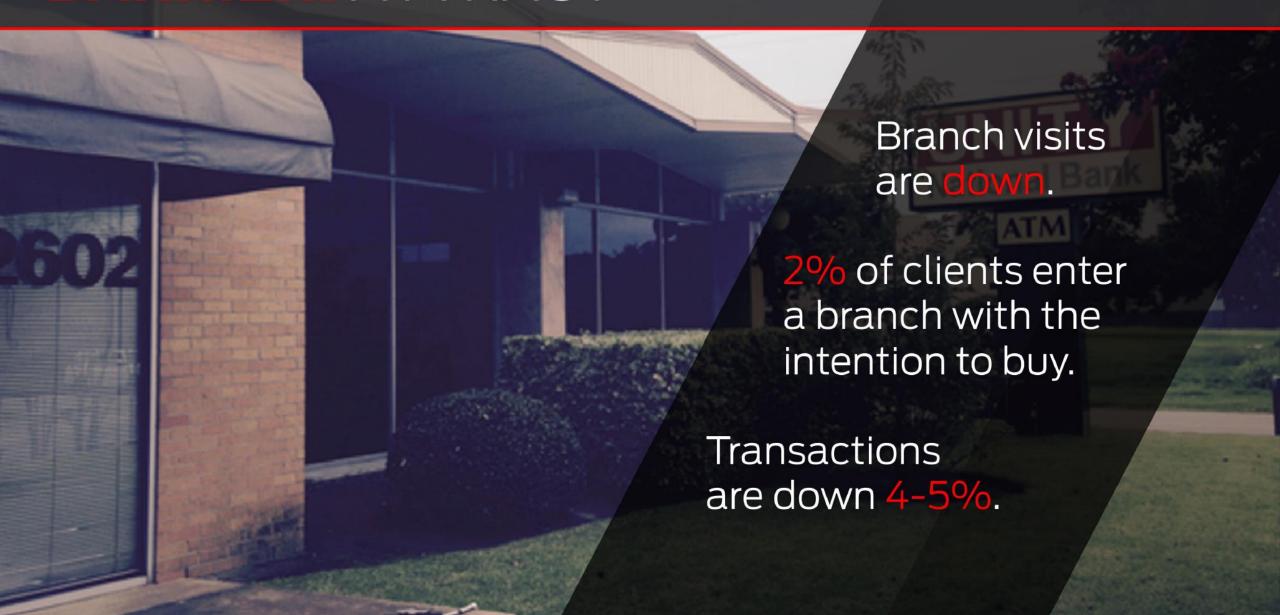
FSR CONFINEMENT

PARTIAL SERVICE

9 **GETTING STARTED**

ATTRACTION

BARRIER: ATTRACT

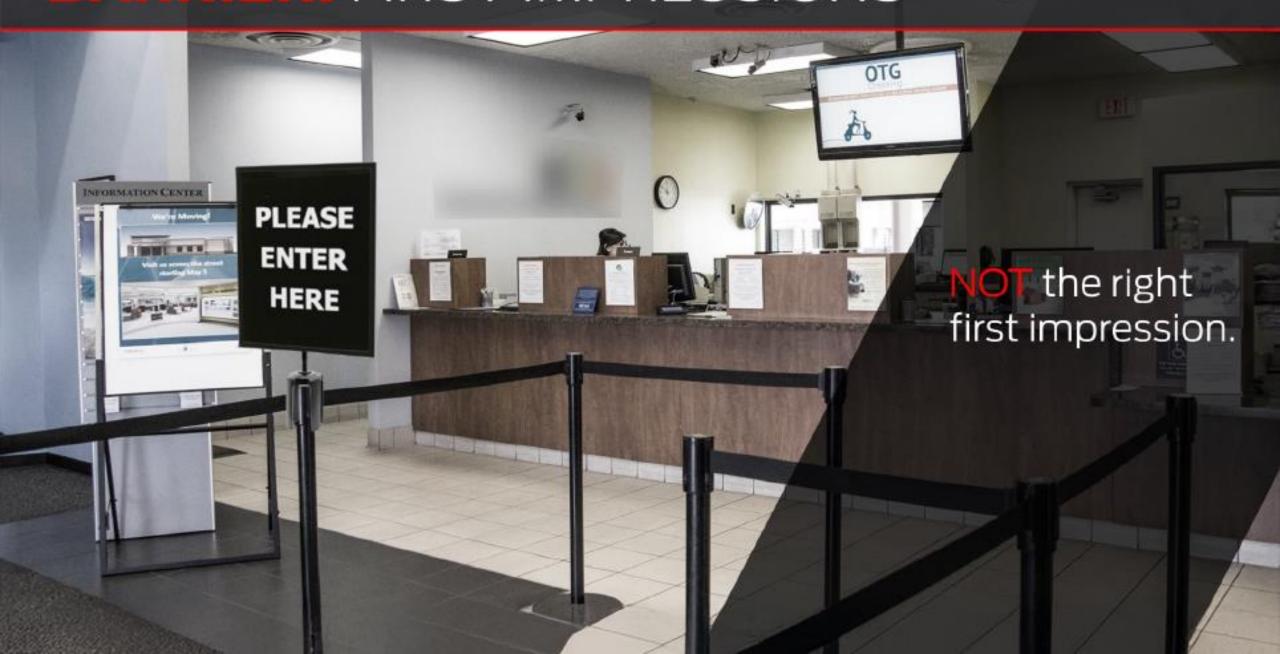








BARRIER: FIRST IMPRESSIONS

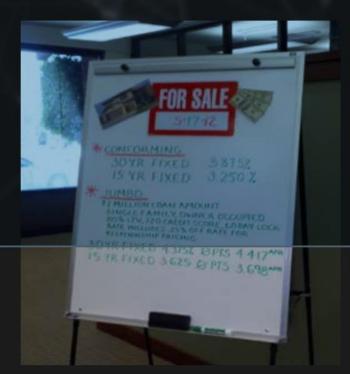




HOW DO CLIENTS CURRENTLY LEARN ABOUT THE SERVICES YOU OFFER?













BARRIER



PEOPLE CHOICE

In traditional queue lines, you can't choose who you want service from—the client gets whoever can serve them next.

50% WASTED TIME, 100% FRUSTRATION



WAIT TIMES

90 SECONDS

The amount of time it takes before your sense of time distorts.



PRIVACY

Proximity affects one's sense of security and comfort.



COLD TRANSITIONS

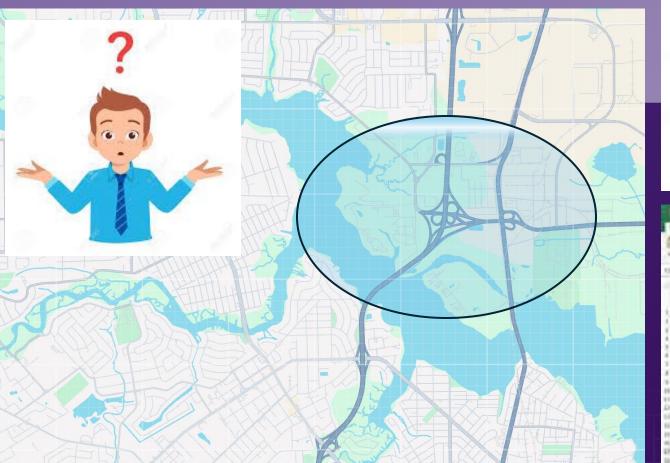
What do tellers do when they have sparked a client's interest in a new product who then needs to see a specialist?

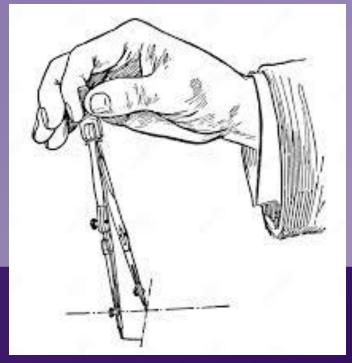
BARRIER

PEOPLE CHOICE, WAIT TIMES, PRIVACY & COLD TRANSITIONS



Branching Decisions – Expansion / Relocation







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Branching Decisions – Expansion / Relocation THE BETTER WAY



Market Exploration

Prioritize branch expansion plans



Site Selection

Define the appropriate means of market entry



Branch Projections

Determine the performance expectations of the branching decision



Business Intelligence

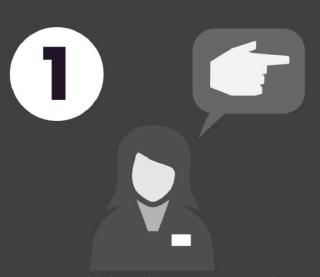
Capture new customers and expand relationships within existing markets



BARRIER: UNIVERSAL ASSOCIATES

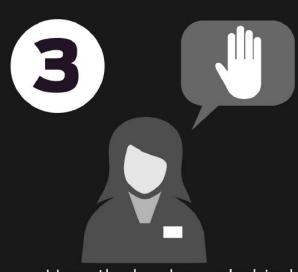
Banker is opening an account for a client who wants to deposit cash into the new account.

What can the banker do?



Ask the client to get in line for the next teller to process the cash deposit





Have the banker go behind the teller line and ask a teller to pause and process the transaction



Thank You!

