

Extraco Consulting

Services Listing

Tailored Solutions

Our services are developed around your needs, so the scope of work is always tailored to you. Many of our clients request an assessment as a first step or prefer to utilize services in phases. Whatever your unique needs and challenges, we'll customize a plan that makes sense for your organization.



“Of all the Banks Celent has researched, Extraco Banks may best illustrate the cultural, technical, and physical transformation needed to address today’s challenges.”

Bob Meara
Senior Analyst, Banking Group, Celent

Take advantage of this interactive form to assist you through your consulting process.

See It In Action

Site Visit at Extraco Banks

Spend a full day on-site experiencing a customized agenda to provide insight into Extraco Consulting's methodologies that will support the client's strategic goals and initiatives, while cutting implementation time in half.

Executive Leadership

Organizational Structure Guidance

Identification of optimal organizational chart structure, including a unique perspective on desired skill sets for current job tasks and overall productivity.

Peer-to-Peer Guidance

Experience customized peer-to-peer strategic leadership guidance and executive coaching, best practices, detailed action plans, committee structure and more.

Strategic Planning

Participate in a customized Strategic Planning Seminar to develop and refine a client selected action plan for any strategic initiative. Full report and action plan included.

Strategic Leadership Succession Plan Guidance

Experience a formal analysis of current succession plans for mission-critical, leadership positions and attain a formal recommendation based on the findings.

Non-Traditional Bank Business Line Development

Development guidance to establish non-traditional lines of business utilized to generate non-interest income. Fully customized to the client's objectives and time-line.

Change Management Executive Seminar

Experience a customized seminar designed to support the change management process, including best practices and guidance for executives to support their teams through the change management process successfully.

Retail Branch Transformation

Retail Lobby Customer Service and Cultural Assessment & Guidance

Experience a critical assessment providing a baseline of the current culture versus the desired culture and/or experience through staff observations, interviews and observing customer interactions at multiple locations and departments.

SWARM Certification & Banking Pilots

Implement SWARM Banking in a new or existing location and/or region to utilize a true universal or full-service employee role with on-site guidance, support, training certification, marketing guidance, and technology optimization assistance.

Lobby Layout Assessment & Recommendation

Review lobby layouts for multiple locations and make recommendations on layout adjustments aligned to the new vision. Multiple options and phases provided.

Reward and Recognition Assessment and Development

Review of current reward and recognition program, both monetary and non-monetary, including guidance to assist in identified areas of opportunity to engage employees, optimizing employee retention and talent attraction in the future.

Retail Product Review and Recommendation

Assessment of current retail product line-up, market review of top competitor products, and guidance on profitable and competitive product offerings.

Alternative Delivery Channel Development

Conduct assessment of current alternative delivery channels and determine strategic planning for creating and enhancing all channels to support the branch network.

Recycler and Virtual Teller Training Development and Delivery

Training material development and delivery available for all recycler or virtual teller models, including best practices for employee and customer adoption, supporting a more efficient employee and customer experience.

Customer Feedback and Satisfaction Routines

Review existing customer feedback routines and develop an action plan to enhance and expand the bank's customer feedback routines, including monitoring expectations. Guidance available on numerous types of customer interactions.

Customer On-boarding and Retention Recommendation

Assessment of current customer retention strategy, identification of opportunities for efficient and proactive customer contact. Includes a strategic plan recommendation to maximize customer retention potential.

CRM Assessment Guidance

Review of CRM system(s) and cultural adoption to develop a strategy to optimize the client's usage of the system and create routines and monitoring tools.

Human Resources and Training

Recruiting Services

From entry-level positions to executive-level positions, expert recruiters will assist in a client's full cycle recruiting process. Candidates will be identified, interviewed, screened and presented based on the client's expressed needs.

Retail Job Design Guidance

Off-site review of retail job descriptions and organizational structure, with a focus on task designs for all lobby employees to align with client leadership's vision.

Retail Hiring Process Guidance

Review existing retail hiring process and provide guidance on structuring the process to attract and hire employees with an optimal fit for client's strategic direction.

Universal Employee Training University Curriculum

Customized curriculum templates, agendas, testing parameters, role-play scenarios and administration guidelines for successful curriculum completion requirements.

Customer Service and Referral Based Sales Training

Customized curriculum facilitated by Extraco Consulting Trainers or in a Train-the-Trainer Certification Seminar, learning curriculum content and presentation best practices.

Change Management Seminars

Customized curriculum available facilitated by Extraco Consulting Trainers or in a Train-the-Trainer Certification Seminar to help leaders and employees work through the disruptive process of change, including best practices for attaining buy-in.

Retail Compensation and Incentive Plan Evaluation & Recommendation

Perform assessment of current compensation and incentive plan(s) and compare the results to the client's culture and vision.

New Hire On-boarding

Create new hire on-boarding process, which will include client's self-administration of new hire orientation, job shadow program, checklists for turn-key implementation and optimal cultural assimilation for new hires.

Retail Management Routines and Best Practices

Experience in-depth management workshop(s) to teach new management routines that will create consistency in the branch employee experience, performance measurements and customer experience.

Retail Manager or Supervisor Mentor Program Development

Develop mentor certification program to assist with certifying newly promoted talent to support the employee's transition into a new management role.

Customized Training Retainer

Customized quarterly training sessions conducted by Extraco Consulting trainers on a retainer basis. Curriculum becomes the intellectual property of the client for ongoing usage.

Customer Education and Change Management

Universal training to illustrate the importance of extending change management practices to customers in order to increase customer loyalty and reduce customer attrition due to changes occurring within the organization.

Process Improvement and Operations

Retail Front-line Process Refinement Guidance

Experience on-site employee interviews, observations, and process mapping expertise to assess the client's current processes and the impact on the employee and customer experience. Recommended opportunities and guidance provided.

Consumer Lending Process Guidance

Utilize experience and best practices to streamline a transition to centralized underwriting and consumer loan processing, including training and action plans.

Core Consulting & RFP Core Selection Process

Mediate the full RFP process for the client for a bank's core operating system and ancillary products. Extraco Consulting will serve as the project manager throughout the process. Contract negotiation and re-negotiation services also available.

Innovation and Continuous Improvement Routines Guidance

Includes a formal recommendation of guidance for communication routines, committees and roll-out best practices to maximize time, effort, efficiency and results to remain competitive within the dynamic marketplace.

Customized Operations Guidance

Develop customized operations guidance with insight from client leadership to determine a strategy that achieves strategic initiatives relating to efficiency and staffing levels with regards to any/all operations departments/personnel.

Marketing Outsourcing

Turn-Key Marketing

Turn-key marketing solutions combines high-quality marketing materials with unprecedented simplicity. Customized with the clients logo, color palette and images.

Marketing Agency Services Retainer

Fully customized services ranging from full branding agency services to template purchases for specific campaigns, employee sales tools and quick reference sheets to full corporate campaigns. Including tracking measurement recommendations.

Social Media Outsourcing

Manage and moderate client's social media channels, including comprehensive monitoring and reporting to gain insights with detailed metrics and graphics.

Retail Marketing Assessment & Recommendation

Full assessment of current routines and results. Formal recommendations provided to identify identified areas of opportunities, including roll-out methodologies and both employee and customer education best practices.

Every bank is unique, so we will work with you to get a time-line in place that fits your strategic goals and objectives.