


**Have You Lost Your Site?**



"Smart" Site Selection for Today's **BANKS!**

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Session Objective

**Provide 3 basic steps on how to start objectively analyzing your current and future branch locations**



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Is this the RIGHT Location?



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Is this the RIGHT Location?



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### Is this the RIGHT Location?



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### How Sites Were Selected



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### Scatter Maps



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### Outlying Property



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### Throwing Darts



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### Chance



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What does my significant other think?



"Let me put my husband on. He's in charge of all our bad decision-making."



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## Reasons You Need a Professional Site Study



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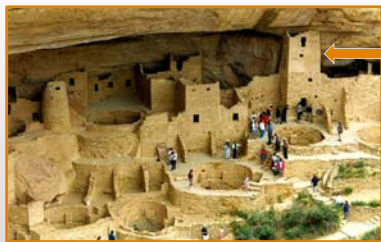
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Has your community evolved?



Bank Here



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Has the downtown activity moved?



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Increased Competition?



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Have under performing branches?



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Branch Network

**Are Your Branches Still in Good Locations?**



MarketPointe Cooks Bay HTG

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No Matter What You Do



MarketPointe Cooks Bay HTG

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Help is on the Horizon



MarketPointe Cooks Bay HTG

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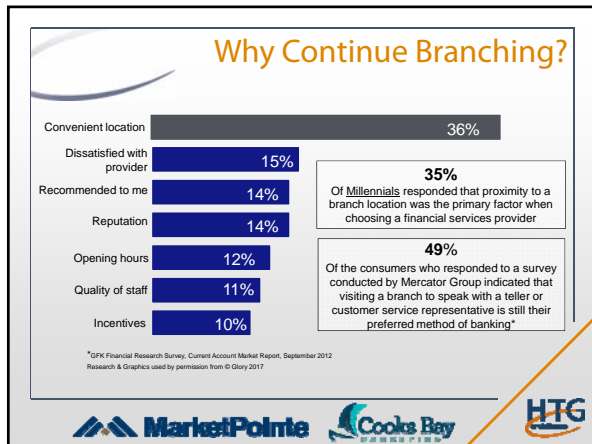
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- ### What To Do Differently
- Modify How You Deliver Financial Services:**
- Embrace and adapt to change
  - Change from a transactional-based to a relationship based organization
  - Become more retail focused!
  - Strategize and grow your distribution channels
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- ### Common Concerns
- Where to begin?
  - How do I determine my distribution strategy?
  - How do I get out of my own way?
  - Who are the right people to involve?
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**Step 1**

**Engage the Right Team**



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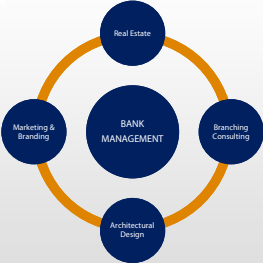
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**Step 1** **Branching Solutions**



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**Step 1** **Creating the Road Map**

- Understand your organization, who and what you are
- What is your Financial Institution's growth strategy?
- What is your current branch network?
- Understand your customer's shopping habits



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**Step 2**

## Collecting the Data and Scoring the Sites




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**Step 2** Collecting the Data

- Drive the community – understand your surroundings
- Meet with the local economic developer
- Organize the data
- Score the individual sites (grading system)
- Produce the supporting mapping data




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**Step 2** Picking the 'Right' Site



Site Value

or



\$100,000                      \$750,000+

The 'right' location can mean the difference between being a \$10 million or \$50 million location




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**Step 2** Analyzing the Data

- Compare each site against your model's formula
- Determine how the data collected compares to your clients' requirements
- Certain site requirements are weighted heavier depending on your clients growth strategy
- Provide a final score for each site
- Determine the drop zones

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**Step 2** Example

One category used for scoring sites is:

**Demographics & Psychographics**

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**Step 2** Statistics

Demographics: Statistical Data

- Population
- Household Density
- Median Income
- Median Age
- Race
- Education

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**Step 2** Perception

**Psychographics: Insight**




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**Step 2** Perception



**Rail Road Track Syndrome**




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**Step 3** Reporting the Findings

- Present the data
- Recommendations
- Securing the property
- Design and Construction
- Marketing and Branding




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**Summary**

- **Step 1 – The Right Team**
- **Step 2 – Collecting the Data**
- **Step 3 – Recommendations & Securement**




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**The Team**

**Thank You**

**MarketPointe**  
Commercial Real Estate



**George Janssen**  
30 + Years

**HTG**  
Since 1959  
2,400 FJ. Projects



**Sean Raboin**  
20 + Years  
450+ Financial Projects

**Cooks Bay Marketing**  
Marketing Agency



**Tiffany Beltier**  
14 + Years




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**Sean Raboin**  
Partner  
20 + Years  
450+ Financial Projects

Sean is a partner with the firm and a registered architect with over 20 years of experience taking client's visions and making them a reality by listening to their needs. Along with his experience and knowledge of the building process, Sean's strong passion and communication skills help strengthen relationships with clients, contractors and vendors during the project process. He attracts, connects and engages with each client.

**HTG Architects**  
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[www.htg-architect.com](http://www.htg-architect.com)






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**George Janssen**  
Principal  
30+ Years



George Janssen is the managing Principal of MarketPointe Commercial Real Estate Services. Prior to starting MarketPointe, George worked with Transwestern for over 7 years in Sales and Leasing. He focused on new business development, third party brokerage and tenant representation in transactions for sales and acquisition. George is a proven self-starter with a strong background in sales, marketing and commercial real estate.

**MarketPointe**  
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**Tiffany Beitler**  
14+ Years



Tiffany (Winter) Beitler is the Founder of Cooks Bay Marketing, an agency servicing primarily community banks. She brings her years of experience in marketing to help banks engage with their communities, increase brand awareness and ultimately, profitability. Her team focuses on branding, digital marketing and traditional marketing methods to create successful marketing campaigns and year-round plans. She is passionate about building relationships with clients and seeing them grow.

**Cooks Bay Marketing**  
612-799-1643  
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