



**CAMELS**  
BusinessLink



**EXPANDING  
RELATIONSHIPS for GREATER  
PROFITABILITY**

## ***Effective Business Development Anytime, Anywhere***

**CAMELS BusinessLink** is an intuitive, cloud-based application that channels individual sales efforts into productive results for your bank—giving directors, management, officers, and staff the tools they need to contribute to the bank's growth and profitability.



**CAMELS CONSULTING GROUP<sub>LLC</sub>**  
*Increasing Shareholder Value*

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*camelsgroup.com*

# Power-up Your Sales Pipeline

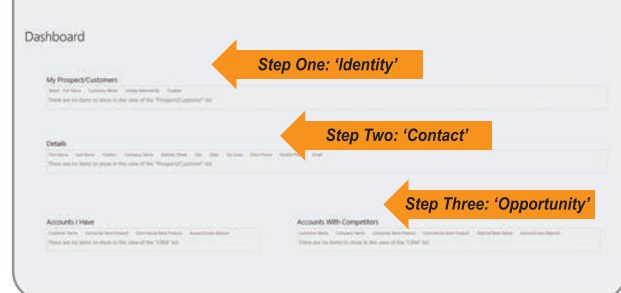
**CAMELS BusinessLink** is easy to learn and can be used on any device with internet capabilities to manage new and existing relationships and advance your sales pipeline by tracking leads, providing referrals, and organizing related tasks.

## Find Your Next Generation of Customers

Staff will immediately see the value of **CAMELS BusinessLink** and be able to effectively use the system after a short orientation session. The program is easy and intuitive—a simple yet powerful tool for capturing customer opportunities.

**Energize your bank's organic growth possibilities.** **CAMELS BusinessLink** is a powerful business and investor development tool giving community banks the ability to continually identify new prospective customers while growing existing relationships.

### Start Your Day With Your Personal "Dashboard"



### **CAMELS BusinessLink** allows you to:

- Identify new customers
- Increase product penetration
- Improve profitability
- Easily plan sales calls
- Identify/track sales issues
- Increase loan production
- Track and report results
- Identify next call steps
- Manage loan disbursements using the Pipeline Funding report

**Manage sales efforts effectively throughout the bank.** With **CAMELS BusinessLink**, users can work with a contact through the full sales cycle, or refer a business lead to other areas within the bank using automatic email alerts, creating new sales and collaborative opportunities.

**Align your bank with your community.** Your contributors can conveniently retain contact information in **CAMELS BusinessLink** ready for either immediate referral to the bank's loan officer, or to set up the next meeting or business luncheon.

**Respond proactively to service issues.** **CAMELS BusinessLink** allows you to identify service issues earlier, enabling your bank to proactively respond and improve the overall customer experience.

## Powerful Reporting Capabilities

**CAMELS BusinessLink** has powerful reporting capabilities allowing your bank to maximize its business development and customer services capabilities.

### Sales Activity Reports

Provides sales analysis by locations, products, and contributors. Offers bank-wide perspectives on sales activity. Eliminate time spent and administrative overhead with **CAMELS BusinessLink's** automatic data aggregation delivering bank-wide reports instantly.

### New Customer Reports

Offers deep perspectives on calling efforts, resultant customer advances, and successes. Plan your calling activities by reviewing report outcomes.

### Service Issue Reports

Tracks all service issues from identification to resolution. Accumulates service data to help improve the customer experience. **BusinessLink** easily handles your bank's CFPB requirements.

### Referral Reports

Tracks all referrals and leads by bank contributor with the ability to assign tasks across the organization and monitor approvals, all in real-time. **BusinessLink** allows your bank to focus on new loan opportunities.

### Shareholder Reports

Manage your bank's internal trading (Buy/Sell) desk and identification of prospective investors and drive stock liquidity for your shareholders.



## The CAMELS BusinessLink Advantage

**CAMELS BusinessLink** increases bottom-line performance and allows staff to fully manage, document, track and measure their own individual call program results.

Sales progress is captured through documentation of meetings and plans for 'next steps' in your calling efforts. You can utilize 'notes' to capture all your client discussions, refer leads, assign tasks, and secure assistance in case you need to be out of the office.

## Energize Your Bank's Organic Growth Possibilities

**CAMELS BusinessLink** is a powerful business and investor development tool giving community banks the ability to continually identify new prospective customers while growing existing relationships.

**CAMELS BusinessLink** captures the information community banks need for Consumer Financial Protection Bureau reporting requirements...it makes compliance easy!

**CAMELS BusinessLink** identifies next call date, allows for assigning of tasks, identification of customer service issues, documenting of account opportunities at other banks, and tracking of your referrals. Your 'sales call' program now has a tool that effectively manages and focuses the efforts of your entire sales team.

**CAMELS BusinessLink** reports are readily available and easily prepared by just a few clicks of your cursor. Simply determine what type of report you want and click on the report name. You will be brought to the specific report page where you can select one of many pre-formatted reports or customize a report to meet your specific requirements.

### Add Bank Product

Customer Name:

Consumer Bank Product:

Commercial Bank Product:

External Bank Name:

Account/Loan Balance:

Product Notes:

Pipeline Funding:

First Disbursement:

Second Disbursement:

Third Disbursement:

Fourth Disbursement:

First Follow Up:

11/14/2015

Second Follow Up:

12/2/2015

Third Follow Up:

2/9/2016

Is Converted?:

☐ (Check, if Yes)

Referred By:

Referral Date:

11/11/2015

Lead Assigned To:

Lead Assigned Date:

11/11/2015

**BusinessLink** easily identifies the product that your prospect or client wants or needs.

## Empower Your Organization With CAMELS BusinessLink

**CAMELS BusinessLink** Schedule a personal tour of CAMELS BusinessLink and see how easy it is to manage your sales pipeline and make your bank's sales efforts more productive. Call or email today using the information below.

See  
**CAMELS BusinessLink**  
 in action.



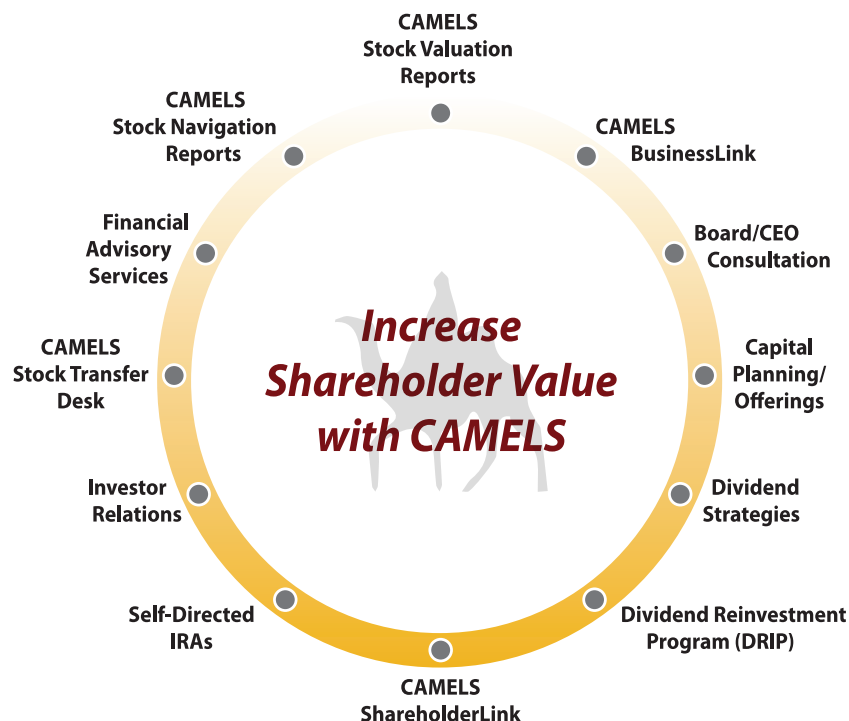
CAMELS CONSULTING GROUP<sup>LLC</sup>  
 Increasing Shareholder Value

**Call 614-746-4634 or**

**Email: [eschmidt@camelsgroup.com](mailto:eschmidt@camelsgroup.com)**

## CAMELS BusinessLink Operating Platform: A Highly Secure, Cloud-Based Solution

**CAMELS BusinessLink** utilizes Microsoft® SharePoint architecture and is web-based, allowing 24/7 access from any internet capable computer. Each user has a proprietary database configuration. The system platform supports integration with MS Office Suite. Microsoft is recognized as an industry leader in cloud security with policies and controls.



**Edward E. Schmidt**  
President & CEO  
CAMELS Consulting Group, LLC

## PROVEN SOLUTIONS *For increasing shareholder value*

*At CAMELS Consulting Group, we focus on one thing:*  
**Providing privately-held and publicly-traded community banks with proven solutions to increase shareholder value.**

*Led by Edward E. Schmidt, recognized for his extensive experience in bank valuation, investment banking and shareholder management, CAMELS offers a comprehensive suite of solutions exclusively designed for the community bank sector.*



**CAMELS CONSULTING GROUP** LLC  
*Increasing Shareholder Value*

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