

We Help Build  
**Commercial Banking Relationships**  
for

**6** of the Top 10 Banks\* in Boston  
**7** of the Top 10 Banks\* in Philadelphia & over  
**100** Community Banks across the United States

\*based on FDIC reported market share (6/30/2021)



COMMERCIAL

**BUILD BETTER<sup>^</sup> RELATIONSHIPS**

***Appointment Setting***

*Qualified appointments  
set by seasoned professionals*

***Brand Awareness***

*Your story and value proposition  
delivered to target markets*

***Data Verification***

*Valuable market intelligence  
captured from top prospects*



**E · X · P · E · R · T**  
**Business Development**

*Masters at the Art of Respectful Persistence*

For more information please contact  
**First Last at (555) 555-5555**  
or visit [www.expertbizdev.com](http://www.expertbizdev.com)



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Business Development

*Masters at the Art of Respectful Persistence™*

*Come In*  
WE'RE  
**OPEN**

## **ARE YOU READY FOR YOUR CRA AUDIT?**

### **IDENTIFY IDEAL PROSPECTS**

We can help you identify your Low and Moderate Income (LMI) Census Tracts for your footprint, as well as your Reasonable Expected Market Area (REMA), and **we will build you a custom database of your ideal CRA target businesses.**

### **CONTACT DECISION MAKERS**

Using your custom database, **our professional calling agents will contact your CRA prospects to set appointments** on your behalf, not only satisfying your requirement for community outreach, but also **generating real business opportunities.**

### **REPORT ON YOUR OUTREACH**

Once we complete our calling campaign, you will **receive complete reports that document all of our calls to each CRA prospect**, which can be submitted to your auditor as proof of your targeted efforts toward your CRA outreach obligation.

*Our calling programs can be built to meet any budget.*

**Contact us today for a FREE consultation!**

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email@expertbizdev.com

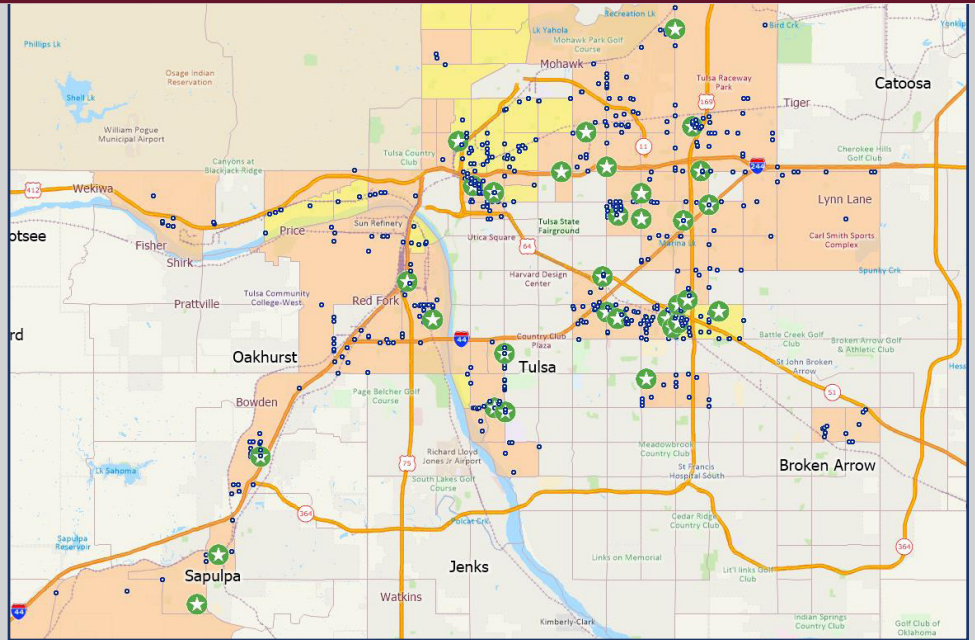


Since 1993, Expert Business Development has been providing professional relationship building services to the financial services industry.

Learn more at [www.expertbizdev.com](http://www.expertbizdev.com)



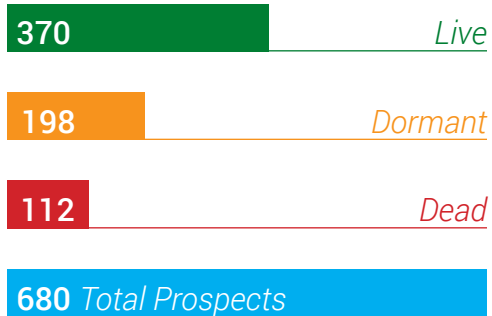
# CRA Campaign Analysis



Low Income Tract
  Moderate Income Tract
  Prospect
  Appointment

## 100 calling hours

over 10 weeks



	Low Income	Moderate Income	TOTAL
Prospects	119	561	680
Calls	237	1016	1253
One Pagers	14	49	63
DMs Engaged <sup>1</sup>	56	207	263
WTMs <sup>2</sup>	-	1	1
<b>Appointments</b>	<b>4</b>	<b>27</b>	<b>31</b>

1. DMs = Decision Makers; contacts confirmed as prospect's banking authority  
 2. WTMs = Willingness to Meet; prospect agrees to meet but without confirming a specific date and time

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