

AA Modeling™



● ● ● ● ● ● The Complete
● ● ● ● ● ● Web-based
● ● ● ● ● ● Statement
● ● ● ● ● ● Modeling
● ● ● ● ● ● Solution
● ● ● ● ● ● for your
● ● ● ● ● ● Bank
● ● ● ● ● ● Calling
● ● ● ● ● ● Officers



847.735.0577
www.weiland-wfg.com

Account Analysis Modeling™



- Interfaces with **any** commercial account analysis & billing system
- Creates account analysis statements customized and branded for your bank, using your bank's wording, service descriptions, benchmarks, graphics and fonts
- Enter (and warehouse) your competition's rates and service pricing for comparison purposes
- Statement can be printed, or a PDF or MS Excel™ file of Statement Models can be created and e-mailed
- System allows unlimited modeling of family relationships
- Portable web based tool
- Available on-premise or SaaS

Empower your calling officers with the one web-based tool they need to show potential customers the value of banking with your institution. Account Analysis Modeling provides pro forma statement models on the fly for prospective clients.

AA Modeling™ provides each salesperson and calling officer a tool that can present the bank standard, custom pricing, or the pricing assigned to a particular region or market segment. AA Modeling™ stores all bank pricing as a blueprint of services in a centralized database. Your bank can keep the service pricing up to date, or periodically refresh the bank pricing blueprint with an import file containing price data.

Easily show prospects how compelling your solutions are - compared to the competition's offering. The statement models use your bank's descriptions and your bank's statement layout. AA Modeling™ makes statement value entry and model building easy. Statement models can be saved and copied, re-used as needed.

With web access, your sales team will have the ability to build live statement models, provide prospects a hard copy or e-mail them as PDF or Excel files from home, on the road, or from the office.

Whether your sales staff is building models to win new clients, or proposing new pricing to existing clients, AA Modeling™ can build a compelling formal account analysis statement for client consideration.

Arm your sales team with the tool they need to do the job. You never get a second chance to make a first impression.

