

How to start with performance management, EMii news, and webinars

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# Making the Case for Impact Performance Management at Your Institution

Kelly Roberts-Robbins, Impact Management and Gender Specialist

Many financial institutions face impact reporting requirements internally, or to meet investors or funders' requirements so *they* can use it for impact reporting. When it's all about reporting, these expectations can seem onerous or extraneous. **But an effective impact management system can benefit your institution in multiple ways.**

The solution lies in the distinction between performance *measurement* and performance *management*. The latter moves beyond measuring performance for risk purposes or investor/regulatory compliance, to analyzing data in a feedback loop to inform business decisions, drive strategy, and create real value for your institution.

To analyze how a performance measurement system can benefit your institution, evaluate your institution's most pressing needs and think through how the current reporting you're doing could feed back into your systems most productively. Do you have upcoming priorities like developing SME-targeted products, executing a new strategy, or targeting a different client segment? Performance management can help with all of these goals. Some examples include:

1. **Assessing return on marketing investment:** Demonstrates efficacy of marketing campaigns, and allows future campaigns to be more effectively targeted
2. **Market segmentation:** Suggests new opportunities among previously-identified segments and refinements to existing ones
3. **Driving uptake among customer segments:** Identifies new markets for existing products and opportunities to increase the market share in current markets
4. **Informing product development:** Surfaces customer needs for new products and pinpoints refinements along the products' development and rollout cycle
5. **Informing strategy decisions:** Provides data to propose changes in strategy, back up resource allocation, and identify blind spots in company focus

Once you've made this business case, your institution can begin building the components of a successful performance management system: identifying KPIs, integrating them with the core banking system, benchmarking results, and developing relevant systems to analyze and support decision making. For more on how to successfully implement this system at your institution, please contact [capacitybuilding@capplus.org](mailto:capacitybuilding@capplus.org).

Related: [CapPlus Webinar: Performance Measurement for SME banks](#)



We want to take the time to recognize Ellen Har, a vital part of our team for eight years, for her transformational contributions. We wish her the very best as she transitions into an equally exciting future at [LISC](#), a domestically-based development finance institution in New York City. We look forward to sharing more about our new Capacity Building Director, who will lead the team with current Manager Alkis



## Get the latest on our current initiative!

CapPlus' [Education Markets Impact Initiative](#) is transforming financial markets to expand access and improve education outcomes in Sub-Saharan Africa. With EMii, we equip financial institutions to finance affordable private schools and the families they serve in a manner that drives quality

Theodhori ([atheodhori@capplus.org](mailto:atheodhori@capplus.org)),  
in our next newsletter.

As always, Alkis and our CEO Lynn  
([lpikholz@capplus.org](mailto:lpikholz@capplus.org)) remain fully  
accessible to our partners and clients,  
who we always like to hear from.

improvements in education. EMii  
benefits:

- Children
- Women and Girls
- Youth
- Education Entrepreneurs
- Local Financial Institutions

[Click here to learn more about how  
EMii works - and how you can join  
CapPlus in this impactful new area!](#)

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# 2019 CapPlus Webinar schedule - registration now open!

**7 February:** [Marketing Financial Services To Entrepreneurs Effectively  
and Affordably](#)

Does your brand have a strong standing in your target market? This webinar, aimed at financial institutions seeking to become leaders in SME lending, shows how to improve your marketing approach to become more effective in building visibility and appeal, while keeping marketing costs affordable. To provide a practical context, the webinar provides examples of marketing to SME entrepreneurs, including to women entrepreneurs as a specific target segment.

**21 March:** [Double Your Financial Institution's Sales to SMEs – Proven,  
Integrated Sales Development Approach](#)

**11 April:** [Big Profit from Big Data – Practical Ways to Embrace “Digital  
Readiness”](#)

**16 May:** Human Centered Design for Financial Institutions – Pt. 1

**13 June:** Human Centered Design for Financial Institutions – Pt. 2

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Bristol-based UK design agency [cxpartners](#) are working with CapPlus in Kazakhstan to help deliver better, profitable microcredit services through customer-centered research at ACF, a microfinance institution.

Although the challenges and products are different, ACF's experience is similar to financial service businesses elsewhere. ACF must respond to increased competition and digitally disruptive entrants who are attracting the higher value customers (leaving behind the poorest and least digitally- and financially-literate), and must improve their service propositions while retaining clients and employees.

CapPlus, cxpartners and ACF look forward to sharing more of this project's story and lessons over the course of 2019, including through Q2 webinars that provide an in-depth look at the human-centered design process



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