



WalletSizing® in Orbis

The fast way to assess your corporate customers' banking wallets

WalletSizing® is the concept of assessing a customer's total annual spend on specific goods and services. It is ideal business development data to identify opportunities, plan more efficiently and drive performance optimization.

WalletSizing® capabilities are now available within Orbis as an additional module, offering estimated wallets ('initial wallets') for over 60 million companies across the globe.

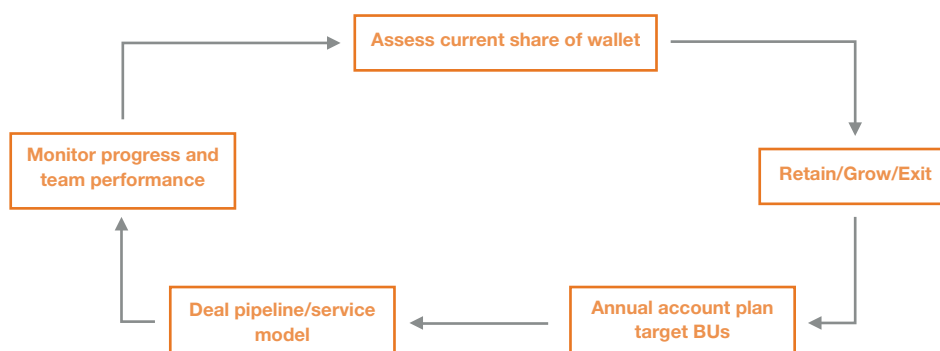
Our WalletSizing® module has been designed specifically for banks to assess the spending capacity of corporate clients on banking products and services. It's the ideal business development tool for Relationship Managers (RMs) to help identify opportunities, plan more efficiently and drive performance optimization.

It gives you a best-practice approach to more efficient planning and allocation of both regulatory capital and human resources.

What's New

- WalletSizing® indicators are available in Orbis in 'List View' and 'Quick Search'.
- A new WalletSizing® chapter is available in Orbis company reports.

(Re)definition of target market clients (based on wallets)



In partnership with

Vallstein

Building sustainable business value

Relationship management	Business management	Bank management
<ul style="list-style-type: none">✓ Deeper client knowledge✓ Better account plans, in less time✓ Higher deal close ratios✓ One wallet language✓ Ownership of targets	<ul style="list-style-type: none">✓ Efficient target market definition✓ Best-practice market analysis✓ Better resource allocation (human/capital)✓ Ongoing monitoring of business momentum✓ Embedded processes, not one-offs	<ul style="list-style-type: none">✓ Advanced business strategy✓ Better overall resource allocation✓ Successful earnings model✓ Cost-Income leadership✓ Predictable and sustainable performance

How it Helps You

The WalletSizing® module in Orbis helps you make better informed decisions, in less time, while optimizing your allocation of both human and capital resources.

The WalletSizing® module helps you to:

- identify sales opportunities with existing customers and new prospects
- understand the banking revenue potential offered by individual companies – and the extended opportunity offered by their corporate group
- get a clearer picture of markets and your client's total market portfolio, using the flexible search criteria to tailor your own market assessment
- get a better understanding of your share of a company's banking wallet
- assess whether you have a fair share of the wallet – a balanced mix of product and services compared to other banks, and make sure your regulatory capital allocation is optimized
- allocate your resources to align with your opportunities
- access ready-made wallet estimates, liberating your time to plan and sell more efficiently and use consistent values across the bank
- get a better picture of where you should be looking to grow, exit or retain business and prioritize your capital resources
- view the ESG ratings of your clients and prospects in the context of their banking wallets
- consider loan pricing on a single credit facility with respect to the total client wallet including validation of potential cross sell