Subject: account planning [C]
From: Stewart Oldfield <[redacted]>
Date: Thu, 19 Jan 2017 10:34:41 -0500
To: Andrew Gallivan [redacted]
Bcc: [redacted]

Classification: Confidential

Client ISG/-
DPM Lending
Wealth Planning Notes

Elysium (Leon Black) Dursi/-
King Farischon

Orix
GM
only
Included in July planning

Southern Financial (Epstein)

Included in November
planning

Third Lake Dursi/-
King

54 Madison
GM only

Tisch Dursi/King

Shamrock

Safanad

Crestline
GM only

Cliff Illig

Week of Jan. 30th is pretty open for these discussions.

Thanks

From: Andrew Gallivan
Sent: Tuesday, January 17, 2017 8:35 AM
To: Mary A Coleman; Brian P Convey; Joanne Jensen; Stewart Oldfield; Elizabeth Payne; Joseph Sabbagh; Terri Sohrab; Terrence F Tangney; Rosemary Vrablic
Cc: Mamie Holland
Subject: [C]

Classification: Confidential

As you've heard Patrick say in previous meetings, our goal is to have a plan for the majority of our clients and important prospects by 3/31/17. Thoughtful client planning, with full participation from your product partners, will identify the growth opportunities for 2017. Thereafter it will be up to you and your product partners to execute against those opportunities with urgency so that we can achieve momentum early in the year. It's important.

These sessions will be different than what you may have experienced in the past. The focus will be on the experience during the sessions and the outcomes. Here is what you can expect:

Preparation for the sessions:

- Let's discuss 10 of your clients for this first round of planning sessions. These should be your top 10 clients/prospects for revenue growth in 2017. They may not be your existing largest clients.

- By Monday January 23rd, please send me the names of the top 10 clients/prospects in your portfolio for growth potential in 2017. In addition, please include any clients who were previously part of the top 100 client planning exercise.

· By Monday January 23rd , please send me the names of the ISG/DPM partner, lending specialists and wealth planning specialists aligned to those relationships identified. I'll want to communicate with them directly about their role in the planning sessions.

· If any of the 10 clients has an existing lending relationship, then I ask that you do the following. Please notify the lending specialist and your ISG specialist. They are responsible for meeting together before the planning sessions so that the ISG specialist can review the financial disclosure on file and identify potential cross-sell opportunities based upon what we know about the client's balance sheet. They will be responsible for coming to your planning session with potential cross-sell ideas.

· Instead of your completing a planning template for each client, your RO will be provided with a pre-populated template from DBForce that contains SOW information and existing relationship details like products, CBVs and revenues. Your RO will be able to aggregate all of your templates into one file that you can send to me and the product partner participants for your sessions. Me and the product partners will be responsible for reading all the templates before your sessions. This will save time for your team and you won't need to give background information during the sessions.

· This week, your RO should go into each of the 10 client profiles and enter the names of the product partners who support those relationships. This is important because those product partners will be tagged with follow up activities for the opportunities identified.

· Your RO should attend each session and be the scribe. They will be responsible for noting each of the opportunities identified and entering those opportunities into DBForce as leads. There will be training for the ROs shortly.

After the sessions:

· DBForce will have a complete list of the opportunities you identified. Your product partners will be able to use DBForce to access the list of the opportunities identified for their product group. You will be able to monitor your team's calling activity against those opportunities and you will be able to use the DBForce list to work with your product specialists on holding each other accountable for follow up activity with clients and prospects.

· I will use the DBForce information to work with you on coordinating your team's efforts on client meetings in support of the opportunities identified.

I'm looking forward to these sessions and please contact me if you have any questions.

In the meantime, please provide me with a few 2 hour timeframes for these planning session for the 10 clients/prospects. I'd like to have all the sessions done by early February.

Thank you everyone!

Regards,
Andrew Gallivan

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