

# Coffee Break: What's Your Treasury Management Sales Team ROI?

December 3, 2015

## Presented By

**Scott Musial**  
Principal

**Marika Christopher**  
Principal



**Treasury  
Strategies**

The Power of Experience®

# Return on Investment



- Expected TM growth of 3%+ a year
- Millions invested in products, online solutions, back end systems
- Returns on these investments have yet to be seen



To have the “R” you need the “I”



## 1. Define & Prioritize Wallet



## 2. Scale Expertise



## 3. Align Coverage



## 4. Transform Talent





- **What is our clients' wallet?**
- **How much do we have?**
- **How much should we have?**
- **How much do we want?**



How do I leverage what the best sales people do naturally so all can succeed?



**People-Based Success**



**Scalable Competencies  
& Assets**



# Align Coverage



## Define & Prioritize Wallet



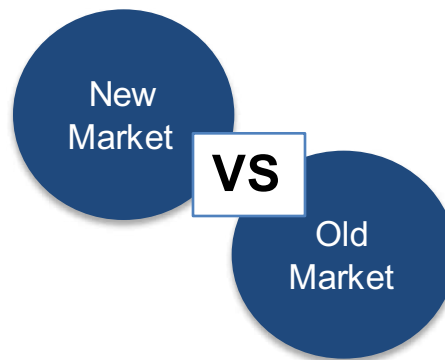
Scale Expertise



## Align Coverage



Credit + TM Client	TM-Only Client
Credit, No TM Client	No Credit, No TM Prospect



INDUSTRY SPECIALIZATION



- **Define** required skill sets for *your* bank and strategic objectives
- **Determine** how to find those skills
- **Train** sales to acquire them





See you in 2016!



**Marika P. Christopher**  
Principal  
[Marika\\_Pappas@TreasuryStrategies.com](mailto:Marika_Pappas@TreasuryStrategies.com)  
P: 312.628.6963



**Scott Musial**  
Principal  
[Scott\\_Musial@TreasuryStrategies.com](mailto:Scott_Musial@TreasuryStrategies.com)  
P: 312.628.6962

Look for an invitation to our upcoming **Organizational Benchmarking Study!**



# Treasury Strategies

## Financial Services Practice



Our strategic advice and pragmatic solutions improve bottom line performance. Clients benefit from our 360° view of the treasury market, deep relationships, and proprietary analytic frameworks that transform data into strategic insights.



### Clients

- Global Banks
- Regional Banks
- Solution Providers
- Associations
- Regulators

### Solutions

- Business Strategy
- Revenue Enhancement
- Deposit & Sweep Pricing
- Sales Training & Effectiveness
- Product Opportunity & Gap Analysis
- Operational Efficiency
- Risk Management & Compliance
- Competitive Assessment & Positioning
- Vendor Selection & RFP Management
- Market Analysis



## Who We Are

Treasury Strategies, Inc. is the leading treasury consulting firm working with corporations and financial services providers. Our experience and thought leadership in treasury management, working capital management, liquidity and payments, combined with our comprehensive view of the market, rewards you with a unique perspective, unparalleled insights and actionable solutions.

## What We Do

### Corporations

We help you maximize worldwide treasury performance and navigate regulatory and payment system changes through a focus on best practices, technology, liquidity and controls.

### Treasury Technology

We provide guidance through every step of the technology process – which includes creating a roadmap, selection, implementation and optimization. Our expert approach will uncover opportunities to optimize the value of your treasury through fully integrated technology solutions.

### Financial Services

Our experience, analytic approach and benchmarks provide unique consulting solutions to help you strengthen and grow your business.

## Locations

Chicago • London • New York

## Accreditations



## Connect with Us



[www.TreasuryStrategies.com/  
content/networking-communities](http://www.TreasuryStrategies.com/content/networking-communities)



@TreasuryStrat



[www.youtube.com/c/treasurystrategies  
inconsulting](http://www.youtube.com/c/treasurystrategiesinconsulting)