

## CASE STUDY

## Investment Banking: *Growing client relationships and wallet share*

### THE QUESTION: Room for Growth



On behalf of the Head of Investment Banking for a global bank, we conducted a Comprehensive Relationship Audit of their Investment Banking clients. Interviews were conducted with CFOs, Treasurers and other senior decision-makers from a carefully selected cohort of corporate and financial-sponsor accounts. These clients were large in size but were in the bank's second tier based on the amount of business they had done with the bank. The primary goal of the effort was to assess which clients were potential candidates for an increase in business that would move them into the top tier.

### THE APPROACH: Establish Effective Lines of Communication



74&WEST discovered that investment banking clients had a very robust and thoughtful approach to selecting an investment bank. These clients are also very willing to point directly to opportunities to do more business with them and to deepen the relationship.

### THE IMPACT: Immediate Tangible Opportunities



Sample outcomes based on the results of the Comprehensive Relationship Audit include:

- Allocated new resources to pursuing a group of more than 20 "A-1" clients – clients with excellent relationships with Bank and who foresaw imminent growth in their business.
- Uncovered upcoming opportunities for targeted M&A work with specific clients.
- Empowered Head of Investment Banking to realign provision of services to be better tailored to specific client needs.