OBE Processes

Internal processes explaining how we work in OBE

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1. Background
2. Corporate
   1. HR
      1. New team member Onboarding Process

When a new member joins the OBE team some onboarding procedures are required in order to flatten the learning curve. Thus, the following training courses should be held:

* Explaining Open Banking
* OBE History and Purpose
* OBE Structure
* Role

1. OBE Program Management
   1. Member Management
      1. Member Lifecycle

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Sub-process** | **Who** | **What we need** |
| **Sales** | Lead Generation |  |  |
| **Sales** | Follow up |  |  |
| **Sales** | Closing | Sales | From OBE: regular updates on what is going on what we should focus on.  From Sales: Updates on who Sales have been speaking to.  From Sales: Updates on feedback (+ve and -ve) about product.  From OBE: Support for specific clients.  *Sales will track all activity in CRM – reporting will be limited to capability of the CRM.*     * End of month reporting. * First Tuesday in the month catch up meeting. |
| **Sales** | Contractualising | ACS | From Sales: Copy of contract [Send that over]  From Sales: Some insight about why the customer wants to join the program in particular. What expectations. |
| **Member Adm.** | Member Onboarding | OBE | Welcome pack  Welcome call  Other processes |
| **Invoicing** |  | ACS | Billing details  / contact |
| **Offboarding** |  | OBE |  |

* + 1. Member Administration
       1. Member Onboarding

When a new member joins, the central team will be notified, and the following happens:

For each member program

|  |  |  |
| --- | --- | --- |
| **Who** | **Action** | **Tools** |
| Central | Send a welcome email  Ask who are the points of contact  Ask who need access to the website  Ask for the logo & a quote |  |
| Local | Invite them to a welcome call |  |
| Central | Check that the email above was sent! |  |
| Central | Update the Member spreadsheet tracker |  |
| Central | Update the account to be a member | Zoho |
| Central | Update the contact to be a Member Representative  Update all contacts for the newsletter | Zoho |
| Central | Ask Marketing to add the logo to the website and the member slide |  |
| Central | Ask Market to do a LinkedIn post  There may be a press release. |  |

* + - 1. Manage Relations with MOUs
      2. Billing
  1. Managing Email and website Requests
     + 1. Managing local inboxes & website requests

**Procedures**

This process is to ensure that all website requests and generic emails are handled

OBE and OBEX websites

All generic email address as listed in the OBEX Local emails Tracker.

1. Check **the relevant** inbox
2. File contact at control list: [OBE Website requests.xlsx](https://konsentusltd.sharepoint.com/:x:/s/OBEsitecollection/EXqLWmRsz3xPmJ8EvyaH80cBn_Vh2EormTzfhp3lRMQl9g?e=Cfwt9Q)
3. Respond according to **Owner list**
4. Flag and leave email flagged on inbox until resolved
5. After resolving, unflag and file at folder "1.1 Answered"

* 1. Weekly and Monthly Updates, Planning and Reporting
     1. Battle Rhythm

Webinars

Prepare

Deliver

Review

See Internal Process\Battle Rhythm and hours.xls

* + 1. Monthly Reports

|  |  |  |
| --- | --- | --- |
| **Area** | **Actions** | **Report** |
| Program Management | Infobox  Member admin | Excel Report  Dashboard  Review |
| Sales & Consultancy |  | Dashboard  Report  Review |
| Outreach, Research and Helpdesk |  | Dashboard  Report  Review |
| OBE Marketing | **Webinars**  Update Mailchimp  Update Zoho  Send Contacts to Local for Sales  Create M + 2 Events  **Publications**  ? | Dashboard  Report  Review |
| OBE Marketing Analytics | Centralise Analytics  Engagement Analytics  Publication Analytics |  |
| Topics Information and Data | Move local to central  Check | Dashboard  Report  Review |
|  |  |  |
|  |  |  |
| Konsentus TPP Tracker | Passporting and TPP  Advise Europe about Transparency directory and GURN Lookp UP  Update Enabled Services  Updates Europe TPP slide for Market Reports  Publish Trackers (PBI) and share with Marketing  Send List and MoM in excel format to Marketing |  |
| K Transparency Directory | Update Caspio. New withdrawn. |  |
|  | GURN Lookup |  |

1. OBE Member Sales
   1. Overview

Sales is performed by the local teams, except the final contractualising which can be followed from Corporate Services.

There will be regular briefings between OBE Central and the Sales team about what we have been doing, what is upcoming and other topics of interest.

An interested Company contacts us (web form/email). They are handed to the local team for follow up.

The local team gives the fact sheet and understands category and size.

The local team give the correct

Offer

Terms and conditions

Subscription form

[And price]

The customer signs and returns the subscription form and billing details.

OBE onboards the new member and invoices them.

* 1. Tools and materials

Each local team will have specific material describing how they operate.

The local team will have:

* A business plan, pricing plan and targets
* Access to Zoho CRM
* Sales Collateral as follows

|  |  |  |
| --- | --- | --- |
| Type |  |  |
| Explanatory Documents | 01 Factsheet  03 Value Proposition  About OBE |  |
| Subscription Documents | 02 Membership Offer document  04 Subscription form  05 Terms and conditions  06 Billing Form  04 Confirmation of fees |  |
|  | 07 Welcome Pack |  |

* 1. Process
     1. Lead Generation

Leads will be gathered by the local sales team or

Leads will be passed to the local team following, Webinars, emails, or website requests.

**Webinars - Central Team** to:

|  |
| --- |
| Collect data from Attendees’ report after each webinar |
| Input information in Webinar Analytics file |
| Collect missing mandatory information from local teams |
| Import new contacts into Zoho |

**Emails and Website requests - Central Team** to:

|  |
| --- |
| Collect data from local inboxes |
| Input information in Web requests Analytics file |
| Forward commercial contacts to local teams |

* + 1. Ongoing Follow up

|  |  |
| --- | --- |
| **Qualification and follow up** | The local team will follow up with the prospect and can discuss benefits, costs, participation and type.  The local team gives the fact sheet and understands category and size.  The local team give the correct  Offer  Terms and conditions  Subscription form  [And price] |
|  |  |

* + 1. Agreement to join (75%)

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Discussion & Closing** | If the prospect shows interest, the sales team will attempt to close the sale. This stage is complete when the prospect confirms in writing that they want to join the program.  **Local Team** send email with :   |  | | --- | | Company Name | | Member Program | | Type of the company | | Tier | | Year One Price (12M) | | Year Two Price (12M) | | Payment Terms (ie. if special conditions) | | Contact name | | Contact email | | Contact phone (optional) | | Notes | |

* + 1. Contractualising (100%)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | **Process** | **Admin & Corporate Services**  (David's team)  Contacts the customer  Asks for the finalised documents   * Signed Contract * Completed Billing information | | **Email** | **Admin & Corporate Services**  sends email to inform its all received.   * Name of the company * Type of the company * Price * Payment Terms * Start date     To: OBE Local Commercial Team  To: OBE Central  To: Finance | |

After the customer has been signed, move to Member Management & Onboarding.

* 1. Reporting and tracking Sales activity

OBE Central will monitor and control the sales pipelines, and agree any exceptions if required.

During the process, OBE Central will validate and report on the pipelines for the different OBE member programs as

* Following move to Contractualisation: Change Prospect Status Update Pricing
* During the phase – ensure that prospects are not being “lost” and that they are being progressed. Resolve issues if needed.
* Following move to “Won”:

General communication. Move to Member Management, Onboarding.

1. OBE Marketing
   1. Participating in external Conferences

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Who** |  |  |
| Receive email invitation | Local |  |  |
| Send to Comms | Local |  |  |
| [Add event to list.](onenote:Membership%202021.one#OBE%20Conferences%20and%20Events%202021&section-id={FF83BFC0-A71B-4C23-8068-6ACD8BDAF23D}&page-id={28036E7B-C702-48D1-B62C-0BC3C6D4F961}&end&base-path=https://openbankingeurope.sharepoint.com/Documents%20partages/OBE%20Membership) | Comms |  |  |
| Meeting. Decide if going or not.  Discuss about terms and speaking opportunities | OBE/Marketing |  |  |
| Add event to [Tracker](https://openbankingeurope.sharepoint.com/:x:/r/_layouts/15/doc2.aspx?sourcedoc=%7Ba1333a9b-d072-4eac-9e78-f461fe8b3b69%7D&action=default&uid=%7BA1333A9B-D072-4EAC-9E78-F461FE8B3B69%7D&ListItemId=5225&ListId=%7BB4F19F51-AC93-416A-840C-AEA5A692DB75%7D&odsp=1&env=prod&cid=e0419995-547b-4a76-b119-553158b512c5)  Add event to JB Calendar (send invite)  Liaise with local team | Comms |  |  |

* 1. Running Meetings (Webinars and Working Groups)
     1. Definitions

|  |  |  |
| --- | --- | --- |
| Definition | Categories | Audience |
| Public Webinars | Webinars | Available to everybody |
| Meetings | Round Tables, Working Groups, Member Sessions … | For a specific audience  Closed to the public  E.g. Member only, Invitation only.  Different words are used |

* + - * 1. Preparation
        2. Invitation
        3. Slides

Create a presentation based on the following subjects:

|  |  |  |  |
| --- | --- | --- | --- |
| Category | Subcategory | Description | Where to find the info |
| Introduction | Presentation’s info | Name and date | [02 OBE Engagement Plan 2022](https://konsentusltd.sharepoint.com/:x:/s/OBEsitecollection/Efv0loLjMqpIhcdzoJDfZmUBmx1ds7Y-AeyQ7fmScaQPeQ?e=opET5f) |
| Agenda | List of items that will be covered | Word document inside the webinar/meeting’s local folder |
| Speakers | Short presentations |  |
| About OBE | Global Presence, methodology, community, challenges, membership program |  |
| Industry updates | An update of the market | [OBE Industry Updates](https://konsentusltd.sharepoint.com/:x:/s/OBEsitecollection/EY-G53siQqZDvHiE6gX5TRoBGGMYlqPTLIiAb02_9rqxUQ?e=dinrUd) |
| Content | Content | Addressing the webinar/meeting’s theme and its issues | [Topics](https://konsentusltd.sharepoint.com/:f:/s/OBEsitecollection/EtSRpn5677tEi8lMSaV4ImMBFuNwahH97GMKbXzrmYNnqQ?e=SAHmPU), [dashboards](https://konsentusltd.sharepoint.com/:f:/s/OBEsitecollection/EhPxg2kmIHVEmZRFyTT6CM8BAQPr5bql_5Hj-Wdn0SPGow?e=YSnNdP) and general OBE documents |
| Closing slides | Upcoming events | Name and date | [02 OBE Engagement Plan 2022](https://konsentusltd.sharepoint.com/:x:/s/OBEsitecollection/Efv0loLjMqpIhcdzoJDfZmUBmx1ds7Y-AeyQ7fmScaQPeQ?e=opET5f) |
| Contacts | Region’s director and region’s general email addresses |  |
| Thank you’s |  |  |

Once the presentation is created, the footnote should be adapted considering the webinar/working group’s name.

* + - * 1. Final Prep

Also, on the day of the event or a few days earlier, invite the presenter as a panellist on Zoom.

* + - * 1. Run the meeting

The webinar administrator must allow panellists to share screen so that the presenter can share the slides. The remaining attendees should be allowed to speak.

Login with the following information:

* [webinars@konsentus.com](mailto:webinars@konsentus.com)
* ZooKON2021!
  + - * 1. Follow up

The team must contact and add to Zoho all the attendees after the webinar.

More information: **Meetings (Follow up)**

* + 1. Meetings (Preparation)

1. Book a time slot in Zoom Webinars using the OBE template (Konsentus login credentials are needed).
2. Change banner picture in branding tab near the bottom to something related to the webinar. Update webinar banner on Canva (OBE login credentials are needed).
3. Send out an Outlook meeting invitation to the Members (get contacts from Zoho reports) and presenter with the link (from Zoom) to register for the roundtable (include the presenter on the invitation).
4. Ensure that RSVPs are the same as in the Zoom registrations. I create the spreadsheet from Outlook, go to my calendar, click on the event, Tracking and copy the status. I check the spreadsheet and only the ones who said 'accepted' and register manually in Zoom the ones who have not registered.
5. Add all the attendees in the Attendee spreadsheet and write YES if they attend
6. Create a folder in One Drive>OBE Collateral (All)>OBE Working Groups.
7. Create the presentation slides according to the agenda.
8. On the day of the event invite presenter as a panellist on Zoom.
9. Run the meeting:
   1. Start the meeting 15 minutes ahead of time.
   2. Allow panellists to share screen so that the presenter can share the slides.
   3. The recording will start automatically once the meeting is started.
   4. Allow each attendee to speak once they join the webinar.
10. Make sure all new contacts are added to CRM.
    * 1. Meetings (Follow up)

Estimated time to set this up. Two hours.

Estimated time to run the process. 30 minutes.

**Sheet Password:** OBEwebinar

[Webinars Analytics.xlsx](https://konsentusltd.sharepoint.com/:x:/s/OBEsitecollection/EYSXuc-FhRJMjpbIItFfPRIB7UFC82102r_sIiay2ABJFg?e=zOtEH6)

**Attendance report available at events' folder.**

**Process the data**

1. Update account and contacts info from Zoho

1.1 Export account and contacts from Zoho

1.2 Update data into 'Zoho data' spreadsheet

1.3 Copy emails from Zoho contacts into colum 'A' on 'email\_to\_account' spreadsheet

1.4 insert information from Marketing Attendance list into 'data' spread sheet

1.5 Replace 'Account - Attendance' column with 'email\_to\_account' information

1.6 Treat account names (ie. Caixabank to Caixa bank)

1.7 Create a tag: YYYYMMDDXX1 [Date][Region (EU)][# number in case there are two]

1.8Fill in 'Account Type' column (Service Provider, PSP etc. Include "Internal" for Konsentus and OBE people.

**Actions:**

1. Add new accounts/contacts to Zoho with a tag as to when they attended
2. Update newsletter tag in Zoho, so they now get the newsletter.

**Report:**

Snapshot in spreadsheet 'Single Event'.

Available reports:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Basic Info** | |  |  | | --- | --- | | Country |  | | Date | # | | Audience (public/Member) | # | | Title |  | | People registered |  | | People attended |  | | New newsletter subscriptions |  | |
| **Accounts** | |  |  |  |  | | --- | --- | --- | --- | |  |  | **Registered** | **Attended** | | 1 | Total People | X | X | | 2 | Internal People |  |  | | 3 | External People | =1-2 | =1-2 | | 4 | Members People |  |  | | 5 | Non-Member People |  |  | |
| **People** | |  |  |  |  | | --- | --- | --- | --- | |  |  | **Registered** | **Attended** | | 1 | Total People | X | X | | 2 | Internal People |  |  | | 3 | External People | =1-2 | =1-2 | | 4 | Members People |  |  | | 5 | Non-Member People |  |  | |
| **Members** | List of membership who attended |
| **Sales** | List of non-members to follow up |

* 1. Publications
  2. Publishing

Publishing a “Publication”

Post Article on website

Send mail to members

Post on LinkedIn

Send internally that it has been done.

* + 1. Manage LinkedIn Publications

LinkedIn is a valuable communication line for OBE to reach the industry. The LinkedIn Posts have to be scheduled, created, reviewed and posted.

The schedule stage is owned by the country director that must create and initial draft.

The country director send the draft to the Marketing team, by email.

The draft is then used by the marketing team that creates the post and publishes it in the respective page.

1. Outreach
   1. Helpdesk
   2. Outreach

Outreach involves talking to members and organisations that are not members in order to gain information and show the value of OBE and build relationships.

Outreach is traced in the OBE Outreach Tracker.

Each year, OBE Local creates a list of targets and the purpose of speaking to those targets. Through the year schedules calls with them, tracking when calls have been held.

Significant calls or interactions are listed in the Outreach Tracker and are tagged with

Whether Specific topics were covered.

Notes: Any short notes as a summary.

Minutes: Whether more detailed minutes exist.

For NCAs: Minutes or notes are stored in the Outreach folder.

For Others: Minutes or notes are stored in the Outreach folder.

Topics: If there are updates on Topics we are following, updates will also be added to that topic. \*\* Do we need to specify this better?\*\*

Slides are stored in the “wider external meetings folder”.

Monthly activity on Outreach is reported in the dashboard and outcomes reviewed each month.

**For the future**

Should we be using Zoho?

1. Managing Topics, Information and Data
   1. Definitions

OBE has a framework which gathers Topics together with a common methodology.

* Easy reuse of material
* Consistent theory, consistent examples.
* Comparison between countries and examples.

The OBE Framework has multiple topics which are defined in the Publications Topics tracker.

Some topics are ongoing/recurring and appear as “Data topics or State of Play Topics”

**Types of information**

* Lists
* Images (Powerpoint)

**Processes**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Description** | **Who** |
| Gathering (Research) | Captured and sent in a standardised format | Local or global |
| Categorising and storage | Categorised and stored in a standardised format. (Global) | Global |
| Polishing | Where slides or visuals are used, there may be an element of formatting. | Global |
| Publishing | Published or integrated into OBE or Konsentus products or reports.  Publications. Reports. Dashboards. Webinars. Training. Consultancy. | Global |

**Categories of Information**

The following types of data and information are stored in a systematic way.

* 1. Managing Topics
  2. Managing Information
     1. Gathering Industry Information

Industry information includes information about regulations or scheme updates or market information.

* Anybody seeing such information should send it to [industryinfo@konsentus.com](mailto:industryinfo@konsentus.com).
* OBE Central will check a list of websites, monthly for updates.
* OBE Central will receive the mail, categorise it and put the information in the Industry Info tracker.
* If there is anything that is exceptionally relevant a LinkedIn post can be created or otherwise shared.
* Each month the list will be reviewed.
* Distributed to Members and Konsentus employees as part of the product dashboard.

| Action | Action | Who |
| --- | --- | --- |
| Get | Send a piece of Industry Information - information about regulations or scheme updates or market information - to: [industryinformation@konsentus.com](mailto:industryinformation@konsentus.com) | Anybody |
| Get | Provide updates and store them directly to that region’s folder | Local |
| Get | Monthly check of specific websites or sources (see excel) | OBE |
| Get | Monthly check of Local sheets. | OBE |
| Store | Catalogue the Information with all fields (see excel) | OBE |
| Check | Each week. Have a look at the updates, to see if there is anything urgent. | OBE |
| Check | Each month. Have a look at the whole list and verify what will be reported. | OBE |
| Report | Provide a monthly report to Members  Provide a monthly report to Konsentus  Provide a monthly report to Local Teams | OBE |

* + 1. Gathering information on Actors

Actors include the key stakeholders, including regulators in each country.

* **Numeric Data.** Each local unit will provide information on the numbers and designations of key players in their country. This is published as the “Country Ecosystem”.
* **Regulatory Data** will be provided from the regulator lists. Each month regulatory data will be
  + Extracted from the software
  + Imported into Power BI [\*\* See separate documentation]
  + Distributed for dashboards and marketing intelligence.
* **Market Data.** Specific data on market players will be gathered as part of “research”
  + Gathered from
  + It will be stored \*\* where?
  + This data is then available for market reports, slides and the Konsentus Transparency Directory.
* **Contact and sales information.** Specific data as part of membership and outreach will be collected by OBE Local in a specific format and loaded into Zoho.
  + 1. Gathering information on Open Banking Enabled Services

Open Banking Enabled Services are services (use cases) that TPPs or Fintechs provide to account holders, who may or may not be aware that this is part of “Open Banking” or Open Finance.

The Open Banking Enabled Services dictionary provides a categorisation of these services.

For each country where this information is gathered

* OBE Local or OBE Central will identify the target organisations, based on the regulatory framework.
* Collect information from those organisations websites.
* Categorise it and store it in the template [Link](https://konsentusltd.sharepoint.com/:f:/s/OBEsitecollection/EuX8v-HjQExNuB7t2tDiZZcBY1PycYN6ga2QEjXAZf8yJQ?e=KC0HXk).
* Send it back to OBE Central where it will be stored and cleaned centrally
* This data is then available for market reports, slides and the Konsentus Transparency Directory.

Additionally, due to the different regulatory implementations and market needs, new use cases may emerge in the local markets. Thus, the local teams should identify these trends as follows:

If the new use cases don’t match the existing category, the local team has to define the new category and name it.

The local team must define and name the new use cases.

For all use cases, the local team must include a set of examples that justify the new use case.

The local team must also create a set of slides with the new use cases.

* + 1. Gathering information on Volumes

Transaction volumes measure the growth of the take-up of Open Banking. Getting volumes is generally hard and relies on publications from official sources, surveys and member information.

Where Transaction volume is collected

* OBE Local or OBE Central will organise the collection method.
* Volume data will be stored in the xxx
  + 1. Gathering information on Country implementation plans

Country implementation plans are show what and how a country is doing in terms of their implementation.

* For each country that is tracked, information will be collected as part of research and a slide created and updated.
* This slide can be used for reference.
  1. Managing (Raw) Data
  2. Monthly Reporting: Trackers, Dashboards and Data

1. Processes for Konsentus
   1. Marketing (TPP Tracker)
   2. Product (Transparency Directory)
      1. Transparency Directory Monthly update

OBE is responsible for the monthly update of the Transparency Directory database. The monthly update includes regulatory changes and contact changes.

The process starts with the download of the AWS extract from the OBE Regulatory Directory.

The extract is then included in the TPP tracker Power BI.

On a monthly basis, OBE has to remove from the transparency directory the entities that became withdrawn and include the newly authorised TPPs.

For the new TPPs, OBE must also gather the relevant commercial information (e.g., Open Banking Enabled Services) and contact information.

At the end of every month, OBE should also update the Transparency Directory with the contact information gathered during the month.

Transparency Directory - developer view

<https://c1ace471.caspio.com/dp/001180009d183bdc4c314558b239>

* + 1. Transparency Directory Monthly Dashboard
  1. Supporting Konsentus Sales team

OBE are here to support Konsentus sales efforts, and OBE interests take second place to KV sales in Europe.

None of Clare's team will have formal responsibility for sales of OBE, from now on, giving the team the room to focus on KV sales.

The team are free to talk about OBE membership, and if helpful OBE will join calls and explain OBE membership.

In these cases we will not follow up with the prospect without the agreement of the sales team. We will also agree how contracting works.

Clare, Joao and I have agreed that OBE can support the Account Management Team which holds regular meetings with customers. Depending on the size of the customer, this could be a person attending the meeting coma or it could be some standard update slides. Claire believes this will help make the meetings more valuable to customers and Improve attendance and the reception of the meeting.

Clare to share a list of meetings, and indicate which ones we may be able to help with.

We also discussed the importance of shared messages and shared knowledge between Konsentus and OBE.

* Concerns about mixed messages.
  + Clare's team will not contact OBE directly for information, but it will come through marketing. OBE to push back if this is not the case.
  + OBE will [has] stop sharing information publicly about TPP usage rates, as this may undermine some of the sales messages. If there are other topics which Clare feel a sensitive she will tell us.
* Concerns about interference with prospects. Clare will give us a list of top prospects. OBE will not contact these prospects without Clare being aware. OBE are looking into how better give updates on who we have speaking to and what information we have been getting.
* Centralization of data. For things like API volumes, Clare will give us access to their volume data and we will see if we can enrich it and create a shared resource.
  1. SMU

1. Using OBE Tools
   1. Wordpress: OBX Website
   2. Granting website access

This process is to that OBEx members have access to the material published as ‘members only’ across OBEx websites.

1. Login at [www.openbanking.exchange/wp-admin/](http://www.openbanking.exchange/wp-admin/) with proper credentials
2. Click in ‘Users’ section in the left side
3. Click in ‘Add new user’ button in the top of the page
4. Fill in user information and tick the ‘Send the new user an email about their account.’ option
5. Select memberships to be assigned in the ‘Role’ dropdown, click ‘Add new User’
   1. Mailchimp

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| --- | --- |
| **Send mail to members** | * 1. Use Mailchimp   2. Design the email using one of the previous OBE Publication templates in Mailchimp   3. Send the link to the document, not the document   4. Select the audience, depending if it's private or public, and depending on which member group it is addressed to.   5. If it's a document that needs to be sent as an attachment, an email can be sent as well.   6. The audience needs to be updated as usual with Zoho reports. |

* 1. Zoom

To be completed.

* 1. Zoho
     1. Member management

For all members who join, or leave update the following.

|  |  |  |
| --- | --- | --- |
| **Account** | **OBE** | **OBX** |
| Account is a member | OBE Member = Y/N | OBX Member program = <program> |
| Program | [OBE] | See above |
| Type of member | OBE Member Type | OBE Member Type |
| Invoicing ID (if known) |  |  |
|  |  |  |
| **Contact** |  |  |
| Point of contact | OBE Member Contact | OBX Contact Type |
| Contact type | OBE Member Contact | <taken from account> |
| Billing rep |  | OBX Contact Type |
|  |  |  |
| **Reports** |  |  |
| A list of Accounts who are members | ‘EU Member Accounts’ | ‘LATAM Member Accounts’ |
| A list of points of contact | ‘EU member representative’ | ‘LATAM member representative’ |
| A list of newsletter subscriptions | ‘EU newsletter subscribers’ | ‘LATAM newsletter subscribers’ |

* + 1. Sales

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| --- | --- | --- | --- |
| **Stage** | **%** | **Meaning of stage** | **Example** |
| Prospect | 0% | We just know they exist but intend to work on them. Maybe we have written to them. | Xx attended the last two webinars. Lets see if they want to join. |
| Aware | 25% | We have sent them info and they ask for further information or a call. | They got the mail and want a call. |
| Interested | 50% | They have understood the information sent and confirm they are looking into it. | That was a good call. They get the point. Now they are asking |
| Committed | 75% | The confirm they intend to join. | OK, they say they are going to join. |
| Won | 100% | They have sent back a contract. | Contract received. |

* 1. Umbraco

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| --- | --- |
| **Step** | **How** |
| **Post document on website** | It goes into Repository as an OBE file secured. |
| **Post Article on website** | * 1. Login Umbraco   2. Under "Content", go to "Open Banking Europe Insights".   3. Click "Create Blogpost Page". On the SEO tab enter a title for the blog article and the keywords of the article.   4. Go to the HTML tab and type the title for the blog again and choose the "1 column layout" and then choose "headline" and "rich text editor". Write the text for the blog.   5. On the settings tab choose the date for the blog to be published.   6. Click "save and publish" at the bottom. |

1. Managing Documents
   * 1. Member documents

See onenote page?

1. Annexes
   1. Sample Mails

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| Process | Text |
|  | Hi ***[name]***,    Thank you for joining the Open Banking Europe Membership Program for TPPs ***[change according to the Member type]***. We would like to have your logo on our website and to announce you on LinkedIn as an OBE Member, so I would kindly ask you to send us your **logo** as well as a **short quote** explaining why you joined the Membership Program. You can check [examples](https://fra01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.openbankingeurope.eu%2Fcommunity%2F&data=04%7C01%7Cj.parracho%40openbankingeurope.eu%7C435fb4be453d4688d90908d8d257ad68%7C83b8ef6ca7fc4fddbc09913dbfe6383b%7C0%7C0%7C637490621323428223%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=tsfgibh8a%2B3N48yTJWmBO74%2BBPh4DTePeos0NiwvBt0%3D&reserved=0) of quotes from other entities that are participants of OBE on our website.    I have now granted you access to the [TPP Members Page](https://www.openbankingeurope.eu/membership/tpp-membership/) ***[replace link and page name according to member type]***, where you can access all the resources we publish for Members.    In case you have any doubts, do not hesitate in contacting me. We look forward to working with ***[company name]***!    Kind regards,  XXX |
| Meetings (Follow up) EMAIL | "Dear,    Thank you very much for contacting OBE.    Please respond this email with your inquire.    Best regards." |
| Sample offer email template | Dear xxx    Many thanks for taking the time to *[attend the webinar]/[register on our website]/[speak to me earlier]*.    Open Banking is a growing topic and our membership is growing rapidly.    I am attaching a short deck that summarises the membership program (activities, benefits, etc).    The membership program is also described [here](https://www.openbankingeurope.eu/membership/about-obe-membership/) and this includes the membership offers ([ASPSP](https://www.openbankingeurope.eu/media/2082/obe-membership-offer-for-aspsps.pdf) |[TPP](https://www.openbankingeurope.eu/media/2085/obe-membership-offer-for-tpps.pdf) | [SP](https://www.openbankingeurope.eu/media/2084/obe-membership-offer-for-sps.pdf) | [QTSP](https://www.openbankingeurope.eu/media/2083/obe-membership-offer-for-qtsps.pdf))    Our website also has information about [OBE Events](https://www.openbankingeurope.eu/resources/obe-community-events/), [OBE Publications](https://www.openbankingeurope.eu/resources/obe-publications/), [OBE Insights](https://www.openbankingeurope.eu/open-banking-europe-insights/) and other material.    We look forward to us joining the community.    Xx |
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| **Code** | **Email** | **Description** |
| S-ERR | Sales | For website registrations using non-business emails |
| S-UPD | Sales | For website registrations interested on receiving regular updates |
| S-REG | Sales | For website registrations of ASPSPs and SPs interested on the Regulatory Directory |
| S-TRP | Sales | For website registrations interested on the Transparency Directory |
| S-ASP | Sales | For website registrations of companies that claim to be ASPSP which we cannot confirm. |
| S-QTSP | Sales | For website registrations of QTSPs interested on the Regulatory Directory |
| S-GEN | Sales | Generic email |
| S-MEM | Sales | For website registrations of interested on the Membership Program |
| S-OBE 1 | Sales | For website registrations of OBE Participant that would like to access documentation. |
| S-OBE 2 | Sales | For website registrations of OBE prospects (non-Participant )that would like to access documentation. |
| S-OBE 3 | Sales | For website registrations of OBE non-Participant that would like to access documentation. |
| S-P2 | Sales | For website registrations of P2 Participants |
| S-UNK | Sales | For website registrations of users whose reason to register is 'Other' |
| S-OBE | Sales | For website registrations of OBE Members |

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| **S-ERR**    **Non business emails** | Subject: Open Banking Europe    Dear Mr./Ms.,    Thank you for registering in the OBE website.    We received your contact in the Open Banking Europe website but we are unable to proceed with the registration. In this sense, I would kindly ask you to register with a corporate email.    If you have any questions, please feel free to contact us.    Best Regards, |
| **S-UPD**    **Regular Updates** | Subject: Open Banking Europe    Dear Mr.-Ms.,    Thank you for registering in the OBE website.    You have subscribed to our newsletter and will start to receive updates on the Open Banking Europe news and events.    For more information regarding PSD2 and the Open Banking Europe initiative, you may access the section "Resources" in the OBE website.    If you are interested in any of the OBE workstreams, please contact us at [info@openbankingeurope.eu](mailto:info@openbankingeurope.eu).    Best regards, |
| **S-ALL** | Dear \_\_\_\_\_,    Nice to meet you! My name is Barbara Ferreira and I am responsible for the business development at PRETA Open Banking Europe. Unfortunately, we were not able to identify your entity as a participating organisation of OBE Directory.    In case you do not know, PRETA OBE has now two different Directories: [the Directory with Regulatory Data](https://www.openbankingeurope.eu/regulatory-directory/about-the-regulatory-directory/), which provides database for the ASPSPs to accurately identify which TPPs are authorised to access their interfaces and the [Transparency Directory](https://www.openbankingeurope.eu/transparency-directory/about-the-transparency-directory/) which contains detailed and standardised information on the bank developer portals and APIs.  Besides that, we hold a [Membership Program](https://www.openbankingeurope.eu/membership/about-obe-membership/) collaborative place with the aim to help the community to find practical solutions to topics related to Open Banking and PSD2.    It will be a pleasure to providing further information our product lines. Let me know what product your interest consists of and I will by happy to help.    Best regards,  Barbara Ferreira. |
| **S-REG**    **Regulatory Directory (ASPSP/SP)** | Subject: Open Banking Europe  Attachments: 4-Page Description/Public FAQ    Dear Mr./Ms.,  Welcome to Open Banking Europe. My name is **[name]** and I work for Open Banking Europe.  We have noticed that you registered in our website with interest in the Regulatory Directory. OBE Directory is a pan-European, centralised and machine-readable repository for regulated entities that can perform access-to-account (XS2A) services across Europe. It is currently open to Account Servicing Payment Service Providers (ASPSPs) and their service providers.  I would like to suggest that we start with a short call to present the OBE Directory and its licensing model. Consecutively, a Confidentiality Undertaking document can be signed in order to allow the access of some further restrict content.  For more information we kindly ask you to check in our [website](https://www.openbankingeurope.eu/resources/public-resources/) here a set of public documents that explains in more detail the Open Banking Europe and the OBE Directory.  Please send me your available timeslots and we will be happy to schedule it.  If you have any questions, do not hesitate to contact us.  Best regards, |
| **S-TRP**  **Transparency** | Subject: Open Banking Europe    Dear Mr./Ms.,    Thank you for registering in the OBE website.    We have noticed that you registered in our website with interest in becoming a participant of the Transparency Directory.  You can find some useful information at [OBE Transparency Directory](https://www.openbankingeurope.eu/transparency-directory/about-the-transparency-directory/), which contains detailed and standardised information on the bank developer portals and APIs that have been implemented as part of ASPSP requirements under PSD2.  In case of interest, you can register to use the freemium version of the Transparency Directory [here](https://www.openbankingeurope.eu/transparency-directory/register-transparency-directory/).  If you have any question, do not hesitate to contact me.  Kind regards, |
| **S-ASP**    **Confirm ASPSP** | Subject: Open Banking Europe    Dear Mr./Ms.,    Thank you for your interest in Open Banking Europe (OBE).    The OBE Directory is open to Account Servicing Payment Service Providers (ASPSPs) and their service providers.    We were not able to identify if your entity is an ASPSP. Before we send you more detailed information, could you please confirm that your entity holds payment accounts?    Best regards, |
| **S-QTS**    **QTSPs** | 1st - Check if the QTSP is already a QTSP EG member [here.](https://openbankingeurope.sharepoint.com/:x:/r/_layouts/15/Doc.aspx?sourcedoc=%7B19A555EB-A0B0-41E7-9B05-04F30B2A1759%7D&file=QTSPs%20%26%20EG%20List.xlsx&action=default&mobileredirect=true)  If it is, send an email thanking them for contacting us and letting them know who is their point of contact.    If not:    Dear Mr./Ms.    Thank you for registering in the OBE website.    Access to the Directory is restricted to ASPSP's for the time being. However, we do have an engagement group between OBE and QTSP’s that meet once a month. Please have a look at the work we have been doing: <https://www.openbankingeurope.eu/qtsps-and-eidas/> .  The attached document describes the terms and scope of how we will continue this collaboration. In case you find it interesting, you can access the [OBE Membership](https://www.openbankingeurope.eu/membership/about-obe-membership/) page on our website and complete your subscription. If you have any question or want some further information, do not hesitate to contact me.    Do not hesitate to contact us if you have any other questions.    Best regards, |
| **S-GEN**    **Generic E-mail** | Subject: Open Banking Europe    Dear Mr./Ms.,    OBE Directory is a pan-European, centralised and machine-readable repository for regulated entities that can perform access-to-account (XS2A) services across Europe. It is currently open to Account Servicing Payment Service Providers (ASPSPs) and their service providers.    The Open Banking Europe initiative works in several other topics such as: operational data (to provide transparency to TPPs), QTSP engagement group, common understanding of eIDAS certificates, identification when four party models are used, the security and identification model for PSD2 APIs. If you are interested in any of the above topics, we would like to invite you to join one of our communities in the OBE website.    You can find some useful information in the public documentation under "Resources > Public Resources" in the OBE website.    If you have any question, do not hesitate to contact us.    Best regards, |
| **S-MEM**    **Service Providers** | Dear Mr./Ms.,  Thank you for registering in the OBE website.    We have noticed that you registered in our website with interest in joining the OBE Membership Program.    Just to give you a brief overview, OBE is working since 2017 to turn regulatory requirements into operational reality and for this reason we have decided to take a step further creating a collaborative place with the aim to help the community to find practical solutions to topics related to Open Banking and PSD2.  Our contact with several service providers engaged with Open Banking made us understand their need for advice, information and insights into the direction this industry is moving. We are now opening up this program to other Service Providers, whether acting as technical service providers, aggregators, hubs or providers of developer portals.  The topics and scope of the work that OBE is currently doing are provided in the Workplan attached.  In case you find it interesting, you can access the [OBE Membership](https://www.openbankingeurope.eu/membership/about-obe-membership/) page on our website and complete your subscription. If you have any question or want some further information, do not hesitate to contact me.    Best regards, |
| **S-MEM**    **QTSP** | Dear Mr./Ms.,  Thank you for registering in the OBE website. We have noticed that you registered in our website with interest in joining the OBE Membership Program.  Just to give you a brief overview, OBE is working since 2017 to turn regulatory requirements into operational reality and for this reason we have decided to take a step further creating a collaborative place with the aim to help the community to find practical solutions to topics related to Open Banking and PSD2.  This initiative aims to address common issues, to provide key information and to find practical solutions to topics related to eIDAS certificate in order to help the financial world meet electronic security requirements. Events are organized to have people from this financial community sit on the same room discussing issues PSD2-related. We see ourselves as the center of this community.  The topics and scope of the work that OBE is currently doing are provided in the Workplan attached.    In case you find it interesting, you can access the [OBE Membership](https://www.openbankingeurope.eu/membership/about-obe-membership/) page on our website and complete your subscription. If you have any question or want some further information, do not hesitate to contact me. |
| **S-MEM**    **TPP** | Dear Mr./Ms.,  Thank you for registering in the OBE website.    We have noticed that you registered in our website with interest in joining the OBE Membership Program.    Just to give you a brief overview, OBE is working since 2017 to turn regulatory requirements into operational reality and for this reason we have decided to take a step further creating a collaborative place with the aim to help the community to find practical solutions to topics related to Open Banking and PSD2.  The topics and scope of the work that OBE is currently doing are provided in the Workplan attached.   In order to reach the widest possible market, the access will be **free** for TPPs during 2020.    In case you find it interesting, you can access the [OBE Membership](https://www.openbankingeurope.eu/membership/about-obe-membership/) page on our website and complete your subscription. If you have any question or want some further information, do not hesitate to contact me.    Best regards, |
| **S-MEM**    **Other** | Dear \_\_\_\_\_,    We have noticed that you registered in our website with interest in joining the OBE Membership Program.  The topics and scope of the work that OBE is currently doing are provided in the [Workplan](https://www.openbankingeurope.eu/membership/about-obe-membership/).  Before moving forward with our conversation, I would like to understand more the role of \_\_\_\_\_ on the Open Banking environment. In case you don’t know, we have different products framed for each type of stakeholder (ASPSPs, TPPs, QTSPs and Service Providers) and it would be a pleasure to send you all the right information according to your company’s interest. Since you registered on our website as a Consultancy group, we would like to understand better your interest on our Membership Program.  In case of interest we can also redirect this conversation to speak about the Training Courses we offer for enterprises.  I am looking forward to hearing from you.  Best regards, |
| **S-UNK**    **New user**  **Why are you signing for: Other** | Subject: Open Banking Europe    Dear Mr./Ms.,    Thank you for your interest in Open Banking Europe. Could you please inform us the reason for your registration?    In case you do not know, OBE has now three different workstreams: the [Directory with Regulatory Data](https://www.openbankingeurope.eu/regulatory-directory/about-the-regulatory-directory/), which provides database for the ASPSPs to accurately identify which TPPs are authorised to access their interfaces; the [Transparency Directory](https://www.openbankingeurope.eu/transparency-directory/about-the-transparency-directory/) which contains detailed and standardised information on the bank developer portals and APIs; and the [Membership Program](https://www.openbankingeurope.eu/membership/about-obe-membership/), created to help the community find practical solutions to topics related to Open Banking and PSD2 and to provide key information to the different market stakeholders. In case of interest in Training Courses, we are also available to discuss what we can offer to help you.      In case you have interest in having more information about any of them, do not hesitate to contact me.  For more information regarding PSD2 and the Open Banking Europe initiative, you may access the section "Resources" in the OBE website.    Best regards,      OR    Dear Mr.&Ms.,    Thank you for registering in the OBE website. Could you please inform us the reason for your registration?    If you would like to subscribe to our newsletter and start to receive updates on the Open Banking Europe news and events, please change your account registration reason to “I would like to receive regular updates”.    For more information regarding PSD2 and the Open Banking Europe initiative, you may access the section "Resources" in the OBE website.    Best Regards, |
| **S-OBE1**    **Already OBE Participants**    **Account Registration Only – NDA signed** | Subject: Open Banking Europe    Dear Mr./Ms.,    Thank you for registering in the OBE website.    You can now access our restrict content at “Regulatory Directory > Restricted Documentation” .    If you have any question, please submit a support ticket in the [OBE Customer Support Portal](https://openbankingeurope.freshdesk.com/support/home).    Best regards, |
| **S-OBE2**    **Not OBE Participants**    **Account Registration Only – NDA pending** | Subject: Open Banking Europe    Dear Mr./Ms.,    Thank you for registering in the OBE website.    In order to have access to our restrict content, please submit a signed copy of the Confidentiality Undertaking in "My account > Choose your entity."    If you have any question, please submit a support ticket in the [OBE Customer Support Portal](https://openbankingeurope.freshdesk.com/support/home).    Best regards, |
| **S-OBE 3**  **Not OBE Participants** | Dear Mr./Ms.,  Thank you for registering in the OBE website.   Unfortunately, we were not able to identify your entity as a participating organisation of OBE Directory.    In case you do not know, OBE has now two different workstreams: the **Regulatory Directory,** which provides database for the ASPSPs to accurately identify which TPPs are authorised to access their interfaces and the **Transparency Directory,** which contains detailed and standardised information on the bank developer portals and APIs.    Please let me know which of the directories is your interest about (or if you are interested in both), so I can give you further information about the access to documentation of each one.    In case of any question, do not hesitate to contact me.    Best regards,  Barbara Ferreira. |
| **S-NDA**    **Confidentiality Undertaking** | Subject: Open Banking Europe    Dear <name>,    Thank you for the call today. Please see below a summary of the points discussed:     * [Insert summary of call: number of entities, applicable price, participation structure – DD/Licensee/SP]     [FOR ASPSPs]  I would like to invite you to access the *My account> Choose your entity* section in the [OBE website](https://www.openbankingeurope.eu/) and upload a signed copy of the ***Confidentiality Undertaking*** which will release a set of technical and commercial documentation that may help you assess our valuable proposition to become a member of the OBE Directory.    [FOR SPs]  I would like to invite you to access the *Resources > Directory Documentation* section in the [OBE website](https://www.openbankingeurope.eu/) and download a copy of the ***Confidentiality Undertaking*** and the ***Service Providers Program*** to get to know our proposition to become a Service Provider affiliated to the Open Banking Europe.    In case your participant entity decides to join, please submit the *Confidentiality Undertaking* and the *Registration Form* (p. 20-21 of the *Service Providers Program*) duly signed by e-mail to [info@openbankingeurope.eu](mailto:info@openbankingeurope.eu).      If you have any questions, do not hesitate to contact me.    Best regards, |
| **S-P2D**    **Phase 2 Directory Distributors (ASPSPs or SPS)** | Dear <Name>,    As a Phase 2 participant, your participant entity was given access to the following:    a) the **Directory Documentation** ([https://www.openbankingeurope.eu](https://www.openbankingeurope.eu/), “Resources > Directory Documentation”) where you should find the Operational, Testing and Legal Documents of the OBE Directory, as well as the onboarding documentation; and    b) the **Directory's test environment** (<https://directory-te.preta.eu/directory/account/login>) where you should be able to test your connection to the Directory, to ensure that it operates correctly and interacts appropriately with its own system. If your participant entity has not completed the testing activities and need assistance on this step, please inform us so we can send you more detailed instructions.    Kindly note that, as a Phase 2 participant, you will have a different onboarding process. The documents you will need to submit are the following:    [ASPSPS:]   * *Testing Self-Certification Form* * *Utilisation Agreement* * *Capacity Opinion* * *Live Contact List* * *SDD Mandate (as applicable).*     [SERVICE PROVIDERS]   * *Confidentiality, Non Disclosure and License Agreement for Service Providers;* * *Service Provider Program Registration Form* (this document is part of the Service Providers Program Description)*;* * *Testing Self-Certification Form.*     Please submit the above mentioned documents by e-mail to [info@openbankingeurope.eu](mailto:info@openbankingeurope.eu).    If you have any questions, do not hesitate to contact us.    Best regards, |
| **S-P2S**    **Phase 2 Licensees joining through a Service Provider** | Dear <Name>,    Following our phone contact, I understand that [entity] is interested in joining the OBE Directory as a Licensee through the affiliated Service Provider [Service Provider].    A mentioned, please find below the instructions to join the OBE Directory:     1. **Access to the Directory Documentation**   Please access in the [OBE website](https://www.openbankingeurope.eu/) the section Resources > Directory Documentation. You will find in this section all the material regarding the OBE Directory.  Since your entity is a participant from the previous phases of the OBE project and since you will join as a Licensee with a Service Provider, please note that:   * Testing Documentation: please disregard all documents, since your Service Provider will be responsible for the access to the Directory. * Legal Documentation: please disregard the following documents:   + OBE Joining Process Terms and Conditions   + Annex [OBE Directory Confidentiality Undertaking] of the *Contractual Framework* * Operational Documentation: these are the Pricing Sheet and the documentation about the access to the Directory and its functionalities.      1. **Joining documents**   In order to join the Directory, please submit the following documents to me by e-mail (attached to this message):     * *Utilisation Agreement*: this is the contract with OBE, whereby you agree with the *Contractual Framework* (legal framework of the OBE Directory). * *Capacity Opinion*: legal opinion to be issued by your legal counsel or by an external legal advisor to confirm that the participant meets the legal requirements to join. * *Live Contact List*: please only fill the Business and Operational contacts (the Directory Administrators will be your Service Provider´s contacts) * *Billing Information Form*: please fill this form with the billing information. * *SEPA Direct Debit (SDD) Mandate* (as applicable): please submit this form if your entity authorises the direct debit of the fees by OBE.     If you have any question, please do not hesitate to contact me.    Best regards, |
| **S-PRI**    **Pricing** | There will be a one off fee payable by the Directory Distributor of €40,000. This will not change whether you pay now, or next year, so you may as well get the benefits now!    There will be **no annual fee**. Previously we had discussed €25,000 for directory distributors / service providers, but we have removed this.    The licensing fee to be paid annually by banks as users is as follows (depending on the size of the bank as measured using Tier 1 capital)     |  |  |  |  |  | | --- | --- | --- | --- | --- | |  | **Category 1** | **Category 2** | **Category 3** | **Category 4** | | **Assets Tier 1 capital**  *in EUR Billion* | > €30 Billion | €10 > < €30 | €0.5 > < €10 | < €0.5 | | **Fee** | EUR 30,000 | EUR 18,000 | EUR 8,000 | EUR 2,000 |     I think that [ASPSP name] has a Tier 1 capital of around €39,000 and so your annual fee would be €30,000. Please, note there will be a charge levied for each regulated entity. |

Annexes

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| Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout Callout |

* 1. Folders and trackers

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| --- | --- | --- |
|  | **Folders** | **Trackers** |
| [OBE Management](https://konsentusltd.sharepoint.com/sites/OBEsitecollection/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FOBEsitecollection%2FShared%20Documents%2FOBExchange%2F00%20Open%20Banking%20Exchange%20Management&viewid=47d4fbda%2D35ca%2D4066%2Dbbfc%2Df6346c993e3b) | Articles  Press Releases |  |
| [OBE Industry Information](https://konsentusltd.sharepoint.com/sites/OBEsitecollection/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FOBEsitecollection%2FShared%20Documents%2FOBE%20Industry%20Information&viewid=47d4fbda%2D35ca%2D4066%2Dbbfc%2Df6346c993e3b) |  |  |
| OBE Data |  |  |
| [OBEX Global (Shared for all)](https://konsentusltd.sharepoint.com/sites/OBEsitecollection/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FOBEsitecollection%2FShared%20Documents%2FOBExchange%2F01%20Open%20Banking%20Exchange%20Global&viewid=47d4fbda%2D35ca%2D4066%2Dbbfc%2Df6346c993e3b) | External Consultants (All)  Comms  Building Blocks | User Guide |
| OBEX Local 1 | External Consultants (Local)  Local folders  Local trackers  Local docs | Engagement Plan  Customers  Sales |
| OBEX Local 2 | External Consultants (Local)  Local folders  Local trackers  Local docs | Engagement Plan  Customers  Sales |
| OBEX Local 3 | External Consultants (Local)  Local folders  Local trackers  Local docs | Engagement Plan  Customers  Sales |