

# 90 Days Employment Plan - MIXO

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Ayotunde Oyewole

# Introduction

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- The treasury management function has developed into a strategic set of activities that is tied to the lifeline of an institution.
- Treasury Marketing, a sub-unit of the Global treasury function that is responsible for meeting the financial needs of clients, also requires some medium to long term planning in order to succeed in a role in the sub unit.
- This presentation reveals a bird's eye view of my activities for the first 90 days of joining MIXO.



# Learn

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- My first few days with MIXO will be devoted to learning and obtaining theoretical and practical knowledge where applicable with particular focus on;
  - Existing financial products for clients
  - New structured products
  - Existing methods of delivering the products to clients
  - Major challenges that have constituted pain points for the MIXO Treasury Marketing team

# Apply

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- I will build upon the information obtained during the learning period to deliver on assigned KPIs.
  - MIXO has been operating for 6 years and so may have some clients whose business relationships have receded into dormancy. Establishing contact with these type of clients helps bring attention to client related challenges aside from generating fresh business.
  - Using digital marketing options, I would focus on signing up new clients by conducting a needs analysis and matching the prospect's needs with MIXO's products.
  - Using cross selling and upselling, the needs of existing and active clients will also be matched with the corresponding financial products – FX, Fixed Income investment products, Loans etc.

# Feedback

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- Following my engagements with clients, feedback will be provided to the team on challenges faced, Competition, Structure solutions possibilities, and specific requests from clients.
- These feedback would help tailor unique products that would help meet clients' needs.



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Thank you