Priority 1 – Essential Client Financial Metrics

| **Category / Topic** | **Business Objective** | **Example Question** |
| --- | --- | --- |
| Revenue Breakdown by Product | Understand revenue mix by product lines | How much revenue does BlackRock generate from DCM vs ECM? |
| Historical Revenue Trends | Identify long-term client performance patterns | What has been Goldman Sachs’ revenue trend over the last 5 years? |
| Revenue Breakdown by Region | Compare client contribution across geographies | How does JPMorgan’s revenue split across North America vs Europe? |
| Loan Book Exposure | Assess client’s borrowing profile | What is Citigroup’s total loan book exposure? |
| Loan Outstanding Amounts | Track credit utilization | What are the current outstanding loan amounts for Morgan Stanley? |
| Resource Consumption | Measure bank resources allocated per client | How many bankers and teams are allocated to servicing BlackRock? |
| Product Penetration | Spot product adoption gaps | Which product lines has Tesla not used with RBC in the past 2 years? |
| Seasonal Revenue Patterns | Detect cyclical changes | How does Q4 revenue for Apple typically compare to Q2? |
| Cross-Product Performance | Compare client engagement across multiple products | How does Amazon’s use of ECM compare to M&A advisory services? |
| Share of Wallet (Financial Metrics Angle) | Evaluate RBC’s role in client revenue | What percentage of Microsoft’s total deal flow with banks comes from RBC? |

Priority 2 – Relationship and Activity Intelligence

| **Category / Topic** | **Business Objective** | **Example Question** |
| --- | --- | --- |
| Coverage Information | Know who covers the client | Who covers BlackRock at the senior coverage level? |
| Interaction History | Track last banker-client interactions | When was the last meeting RBC bankers had with Tesla’s CFO? |
| Deal Execution History | Monitor pipeline status | What announced deals does JPMorgan currently have in execution with RBC? |
| Contact Management | Map key client stakeholders | Who are Microsoft’s primary decision-makers RBC should be engaging? |
| Relationship Strength | Evaluate depth of client engagement | How many touchpoints has RBC had with Goldman Sachs in the past quarter? |
| Cross-Line Coverage | Check multi-product engagement | Is Apple covered by both Corporate Banking and Investment Banking? |
| Relationship Gaps | Identify weak or missing coverage | Which of the top 50 clients lack senior coverage? |
| Meeting Outcomes | Assess value from past client meetings | What were the action items from RBC’s last meeting with BlackRock? |
| Opportunity Surfacing | Spot new potential mandates | Which clients mentioned strategic reviews in recent interactions? |
| Banker-Client Alignment | Understand banker hierarchy on accounts | Which MDs are responsible for Citigroup’s global coverage? |

Priority 3 – Market Intelligence

| **Category / Topic** | **Business Objective** | **Example Question** |
| --- | --- | --- |
| Wallet Share Analysis | Measure RBC’s share of client activity | What is RBC’s wallet share of BlackRock’s M&A fees this year? |
| League Table Rankings | Track RBC’s competitive position | Where does RBC rank in global ECM league tables against Goldman Sachs? |
| Competitive Positioning | Benchmark against peer banks | How does RBC’s advisory revenue from Tesla compare to JPMorgan’s? |
| Sector Trends | Spot shifts by industry | Which sectors saw the largest increase in wallet share this quarter? |
| Peer Comparison | Compare wallet share across clients | How does RBC’s wallet share with Apple compare to Microsoft? |
| Cross-Bank Exposure | Evaluate client’s use of competitors | Which banks did Citigroup mandate for its most recent bond issuance? |
| Lost Deal Tracking | Capture market intelligence on missed deals | Which M&A mandates did RBC lose to competitors in 2023? |
| Market Entry Opportunities | Spot underpenetrated clients/sectors | Which S&P 500 companies has RBC not transacted with in the past 5 years? |
| Competitive Threats | Detect competitor push into RBC’s clients | Has Goldman Sachs increased its wallet share with RBC’s focus clients? |
| Long-Term Positioning | Track RBC’s evolution in key markets | How has RBC’s league table position in ECM changed over the last decade? |