



**BUREAU VAN DIJK**

A Moody's Analytics Company



**walle sizing**  
catalyst

The fast way to assess  
your corporate customers'  
banking wallets

**Vallstein** ® Clearly  
Better  
Banking

**Welcome to the  
business of certainty**

# The ideal business development tool to identify opportunities, plan more efficiently and drive performance optimization

WalletSizing® is the concept of assessing a customer's total annual spend on specific goods and services.

Knowing the size of a customer's wallet gives you a significant advantage when you're planning and managing sales and marketing. And it's particularly helpful to compare a company's wallet with its current spend on your products and services, so you can assess if that customer offers you more opportunity.

WalletSizing® gives you a best-practice approach to more efficient planning and allocation of both regulatory capital and human resources.

Our WalletSizing Catalyst has been designed specifically for banks to assess the spending capacity of corporate clients on banking products and services. It's the ideal business development tool for relationship managers to help identify opportunities, plan more efficiently and drive performance optimization.

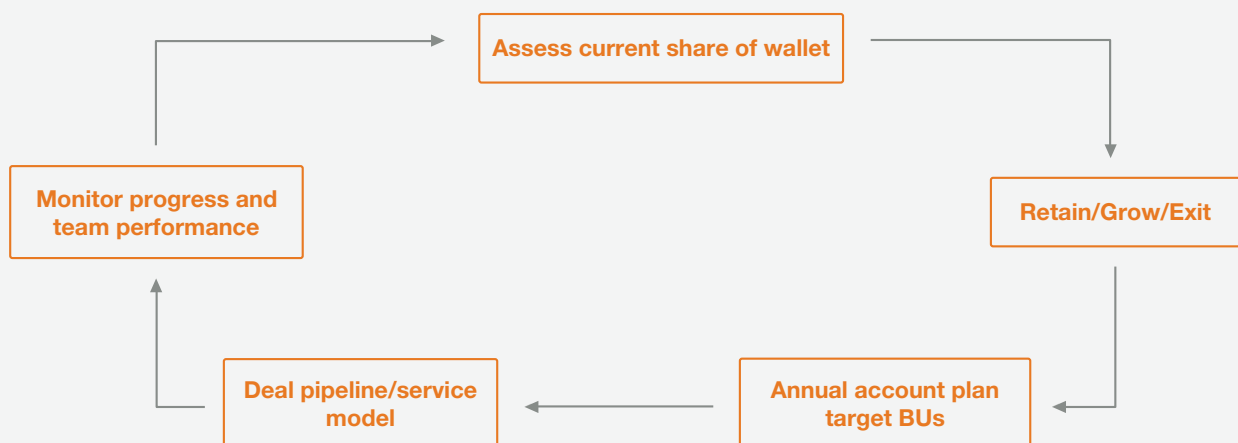
WalletSizing Catalyst combines the financial data from our comprehensive company database, Orbis, with modelled data from our partner Vallstein – a provider in the bank relationship management field and an expert in WalletSizing®.

Vallstein has developed a methodology that calculates a company's total wallet using actual corporate wallet data, as well as the country and sector profiles, financial rating and average pricing per banking project.

WalletSizing Catalyst offers estimated wallets for nearly 32 million companies across the globe. We refer to these estimates as initial wallets. You can append these initial wallets with your own knowledge of a company to create adjusted wallets – tailored data to use in your analyses and planning.

WalletSizing Catalyst also offers the flexible searching and analytical functionality that's associated with Bureau van Dijk's products. So you can easily aggregate wallets across industries, regions, company size bands, credit ratings and even corporate groups for market assessments. And you can combine search criteria to find new sales opportunities by region, size and industry.

## (Re)definition of target market clients (based on wallets)



## Building sustainable business value

Relationship management	Business management	Bank management
<ul style="list-style-type: none"><li>✓ Deeper client knowledge</li><li>✓ Better account plans, in less time</li><li>✓ Higher deal-close ratios</li><li>✓ One wallet language</li><li>✓ Ownership of targets</li></ul>	<ul style="list-style-type: none"><li>✓ Efficient target market definition</li><li>✓ Best-practice market analysis</li><li>✓ Better resource allocation (human/capital)</li><li>✓ Ongoing monitoring of business momentum</li><li>✓ Embedded processes, not one-offs</li></ul>	<ul style="list-style-type: none"><li>✓ Advanced business strategy</li><li>✓ Better overall resource allocation</li><li>✓ Successful earnings model</li><li>✓ Cost-Income leadership</li><li>✓ Predictable and sustainable performance</li></ul>

## How it helps you

WalletSizing Catalyst is a powerful tool that not only saves you huge amounts of time, but also helps you implement a consistent, solid and scalable WalletSizing® process across your bank.

WalletSizing Catalyst is a completely scalable solution driven by highly innovative technology – it can support as many or as few users as you need across the bank.

It helps you make better informed decisions, in less time, and optimize your allocation of both human and capital resources.

It also helps you to:

- identify sales opportunities with existing customers and new prospects
- understand the banking revenue potential offered by individual companies – and the extended opportunity offered by their corporate group
- get a clearer picture of markets and your client's total market portfolio, using the flexible search criteria to tailor your own market assessment
- get a better understanding of your share of a company's banking wallet
- assess whether you have a fair share of the wallet – a balanced mix of product and services compared to other banks, and make sure your regulatory capital allocation is correct
- allocate your resources to the most appropriate areas for opportunity
- access ready-made wallet estimates, liberating your time to plan and sell more efficiently and use consistent values across the bank
- get a better picture of where you should be looking to grow, exit or retain business and prioritize your capital resources

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