



salesforce

Corporate & Investment Banking

Accelerating deal management with greater efficiency, transparency, and insights



Helping deal makers work better, faster, and smarter — all while increasing deal flow

Managing deals takes a lot of work and time — days and evenings working through research, analysis, planning, correspondence, client interactions, approvals, deal team meetings, statements, reports, and business filings. Many investment bankers and their colleagues still use traditional tools like spreadsheets, word processing programs, point solutions, or homegrown applications to manage their deal lifecycles. Data sources that help bankers understand valuable client insights and market trends live in disparate systems. With multiple teams working on many activities at the same time, no one has a single, shared view of deal activities and progress. This can result in redundant efforts, a lack of coordination among dealmakers, extended deadlines, and missed investment banking opportunities.

Bankers traditionally rely on trusted relationships to identify new investment banking opportunities. Intelligent analytics leveraging internal, external data and relationship maps can identify trigger events and support bankers with actionable insights — the next best action to drive net new deal flow and take advantage of first mover activities.

The sheer size and complexity of deals can lead to security and compliance issues. Sensitive information needs to be accessed, shared, and protected among stakeholders at precise times and in specific formats.

To address this challenge, KPMG has partnered with Salesforce to pair our deep industry knowledge with their industry-leading Customer Relationship Management solution to create a **technology solution tailored to create transparency into the holistic deal management lifecycle**. Digital capabilities replace manual tasks, empowering bankers to focus their time on personalized client engagement, while also providing analytics and insights to help bankers identify trends and proactively generate net new deal flow.

“

With Corporate and Investment Banking for Financial Services Cloud, we're providing bankers with new ways to build and deepen relationships with customers and manage key accounts by leveraging artificial intelligence.

Jujhar Singh, EVP and GM of Salesforce Industries

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Corporate & Investment Banking with KPMG and Salesforce

KPMG is one of the few global launch partners for the new Salesforce Corporate and Investment Banking (CIB) functionality for Financial Service Cloud.¹ KPMG offers pre-built, customizable solutions that accelerate the impact of Salesforce CIB, providing the below key features:

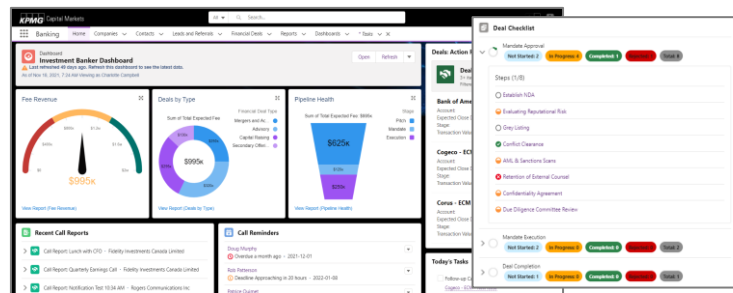


- Legend**
- CIB Model (Salesforce) only
 - Salesforce & KPMG synergy
 - Deal Management Accelerator (KPMG) only

Deal Management At-a-Glance

Bankers can leverage the Banker Homepage as a launchpad for detail into their deals, understand who is meeting with their clients, create call reports and tasks, and see at-a-glance how all of their deals are progressing. All of this can be done with the confidence that all data is secure due to an “ethical wall” allowing for private side regulatory requirements and public side users to coexist in the same environment.

Illustrative Banker Homepage



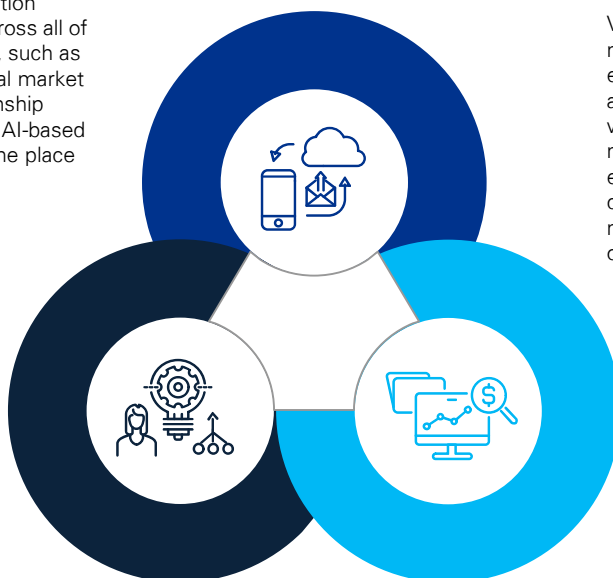
“A dashboard for all of my banking needs”

¹ Source: Salesforce.com ‘Salesforce Expands Its Financial Services Offerings for Corporate and Investment Banking’ 9 June 2021

Accelerate Impact with KPMG solutions built on Salesforce

Streamline Daily Responsibilities

KPMG assets coupled with Salesforce's powerful tools allow for improved collaboration through integration across all of your daily applications, such as Outlook/Gmail, external market data providers, relationship intelligence tools, and AI-based research tools, all in one place and from any device.



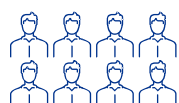
Provide Transparency into Deal Management Workflows

Visibility into the holistic deal management lifecycle creates efficiencies for bankers and alignment across the entire team. Strict ethical wall restrictions enable a security model that is easy to use, flexible and enforces compliance. The deal checklist covers each stage of deal management and provides a clear view of the current stage.

Generate Unique Insights for Deal Origination

First mover advantage for deal origination as our solution can consolidate data from various sources so you can be alerted to everything from your clients' bidding trends, key news, and personnel changes.

KPMG Global Salesforce Capability & Scale



480+

Practitioners



1800+

Certifications



22

Countries

Connected. Powered. Trusted.

KPMG consulting teams bring an industry-led, customer-centric approach to enterprise-wide transformation that aligns the front, middle, and back offices for efficiency, agility, and profitable growth. The solutions, frameworks, accelerators, and tools in our "Connected. Powered. Trusted." portfolio are designed and engineered to support continuing innovation and sustainable high performance in a fast-moving digital world.

- **Connected Enterprise.** Connected Enterprise is a customer-centric, enterprise-wide approach to digital transformation that focuses all enterprise functions, processes, and relationships on a single purpose, harnessing the power and potential of customers to fuel profitable and sustainable growth.
- **Powered Enterprise.** Powered Enterprise is the KPMG outcome-driven functional transformation approach that combines deep functional knowledge, tested delivery capability, and leading technologies to drive sustainable change, rising performance, and lasting value.
- **Trusted Enterprise.** KPMG enterprise-wide risk solutions deliver on the customer promise of safe, secure, and consistent interactions, enabling our clients to inspire stakeholder trust.

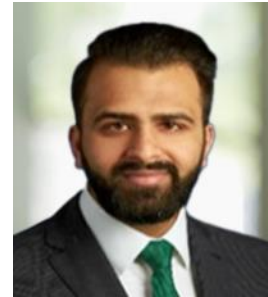
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