



Are you spending too much time with your banks?

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First Class Relationship Management

Adam Smith Award 2016

Microsoft – George Zinn, Anita Mehra, Joel Combs,
Chad Becker

How it got started

- People development
- Stay current on market developments
- Innovative ideas
- ROI on time invested
- Focus on 'Green'
- Productive engagements

Specific questions we asked

- What is the best way to spend the team and banks' time?
- What are the banks trying to achieve and do they get the desired outcome?
- What is Microsoft's desired outcome from these meetings?
- Are there any tangible benefits?
- Is the additional carbon footprint worth it?

A different approach with bank partners



Change is hard

- Evaluate current success metrics
- Fairness – actual and perceived
- Never been done before
- Follow through on proposal
- Consistency & being transparent
- Leverage technology

Project implementation

- Tiers of engagement level
- Focus on Diverse firms
- Tracking and internal reporting via Power BI
- Clarity and objective evaluation
- Respecting IP from banks

Key benefits

- Higher ROI on time spent in meetings
- Clear expectations and desired outcomes
- Focus on unique value-add ideas
- Enhanced job satisfaction of the team
- Green business practices and reducing travel expenses
- Leveraged Microsoft's cloud-based Power BI

Q&A

Thank You



QUESTION TIME



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