confirmation.

Best,

Haig

----- Original Message -----
From: Caroline Kitidis
Sent: 09/16/2013 07:46 PM EDT
To: Dario Schiraldi; Haig Ariyan; Chip Packard
Subject: a few things - Weekly pipeline, focuses and quick update [I]
Classification: For internal use only

Dario, Haig and Chip,
So you have it - here is an example of the weekly pipeline, themes and focuses we go through each week (recently instituted :-)). This is a good way to have a sense of 1. Assessing client opportunities (and likelihood of rev. and close) 2. Creates accountability and focus and 3. Allows us to idea share and leverage across the team, client base etc.
Can send it to you weekly if helpful. Also, we will have monthly packet where we will have 'recent closes' added to it as well as revenue numbers, % change YOY, % vs. target etc.

[attachment "weekly pipeline and focuses.pdf" deleted by [redacted]

Also, from a deal and client perspective a few updates:
1. Very good meetings from Luis's trip to Brazil, see summary in packet. 13 meetings w/ a lot of follow-up. Raph and team have been making good progress getting in front of bankers. Now its about closing accounts, and being able to properly cover them - from a support and infrastructure perspective. Work in progress.
2. Tazia has been involved in a number of new pitches and client opportunities, new KCP on-boarding - see pipeline. Work in progress.
3. Private transactions: Raph is driving Ritz real estate deal, which we finally got over some internal compliance/legal hurdles (all on board) but we need to fix process which I'm working on. $30mm of soft demand in LatAm, one client $90mm out of US but nothing confirmed yet - will continue to garner interest here in US to see if we can move to next stage of being involved in deal. Dario this should fall into the Private markets process you were highlighting last week - we have a call w/ Taroun on Wed to review for future business.
4. Have been meeting many bankers and PCS folks and spending time networking internally. Its been taking up alot of time, so trying to manage across the next couple months.
5. Have been out with some of the bankers meeting a number of clients: J. Epstein (Morris), G. Mosko (Sohrab), Lazari/Mathis (Sohrab), T. Volah (Ahdieh) ; Also on my list and setting up time w/ Tisch Family (Morris), Carl Icahn (Rosemary), David Zalaznick (Stepania), Mort Zuckerman (Jenssen), Jospehine Linden (Morris).
6. I will be having a team meeting with the group on Thursday to review - Team: update and desk strategy, structure/seat change, key responsibilities and oversight; Global & Regional Project List, YTD Business update and 2014+, Desk Roll out strategy and 2014+. In terms of structure, see attached, will send you materials if you'd like to see them on Wed. Let me know.

[attachment "team structure.pdf" deleted by [redacted]

A lot more work to do from a team, infrastructure and business perspective, but wanted to give you quick updates as I can...

Kind regards,
Caroline

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Caroline V. Kitidis
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