Key Client Partners (KCP) – Americas

2014 Business Rollout, Timeline & Milestones

2013 | 2014

October | November | December | January

Business, Team Review and Set-up

- KCP / WIC Team Mtg: Strategy and Structure, Seat move. ✓
- KCP / WIC Idea and Product creation - Revenue Focus ✓
- Review of KCP legal, compliance, documentation/onboarding ✓
- Broad KCP Global Launch - Pulse ✓
- Broad KCP Americas Launch - Email ✓

Ongoing:
- Headcount / resources
- RCs / revenue reporting
- DB Centers – admin transitioning
- Product platform focus – targeted products
- Relationship deep-dive – current accounts and proactive targeting
- I.T. investment
- Legal & Compliance process

WM Engagement, Roadshow, Platform Roll-out

- Roadshow regionally, Roll-out of Offering and Strategy — *In Process*
- Continuation of PIC - KCP Transition and New KCP onboarding — *In Process*
- WIC - Roll-out of Updated Business strategy, Advisory and Non-Advisory — *In Process*
- WIC - Integration with PCs, Review of portfolios, strategy, 2014 focuses — *In Process*

Launch of KCP Americas Offering
Internal: Client Review, Product and Offering Build

- Launch Call - KCP offering, team structure, regional coverage ✓
- Kick-off Monthly Ideas / Themes Call ✓
- Existing Client account review — *In Process*
- Product build-out and focuses — *In Process*
- Client Account Strategy: Classification, Monetization, Aquisition — *In Process*

Phase 0: Review of Team / Business → **Phase I:** Kick-off of KCP Americas, Implement Strategy → **Phase II:** Roll-out Offering, Client conversion, client onboard

Today

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