

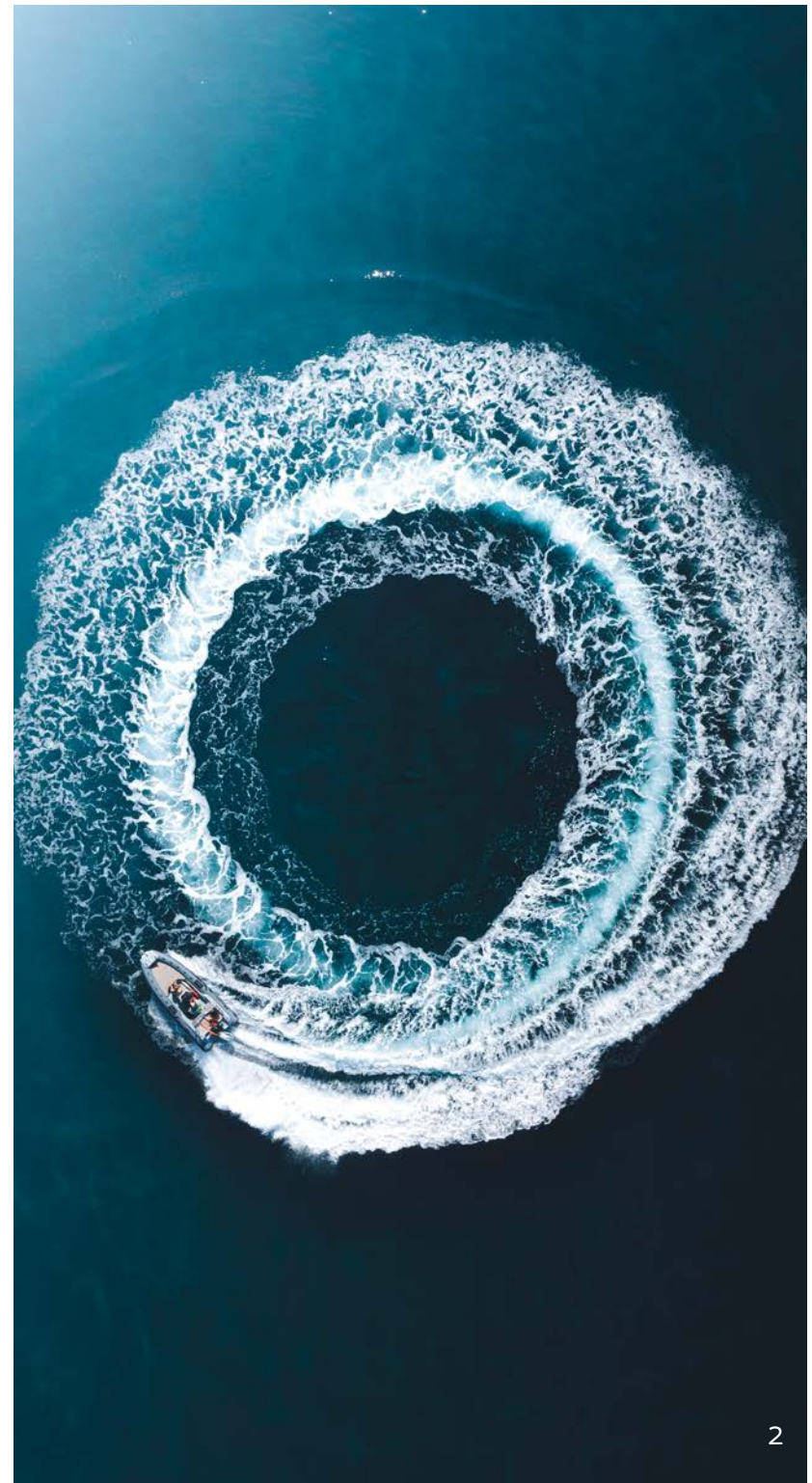


Industry
Intelligence
Throughout
the Enterprise

YOU KNOW THAT INDUSTRY INTELLIGENCE IS THE GO-TO FOR COMMERCIAL AND SMALL BUSINESS BANKERS WHO ARE PREPPING FOR A CALL – IT'S AN ESSENTIAL RESOURCE IN THEIR TOOLKIT.

But there are countless other lines of business all across the bank enterprise that can benefit from Industry Intelligence as well.

Let's take a trip around your bank to explore how different groups can save time, build trust, and win more deals with the effective use of Industry Intelligence.







Business and Commercial Banking



Small Business/
Branch/Virtual



Bank Marketing
Teams



Treasury
Management



Wealth
Management/
Investments



Commercial/
Business
Card Services



Credit
Underwriting



Private Equity/
Corporate
Banking



Small Business
Platform
Lending



Group
Banking

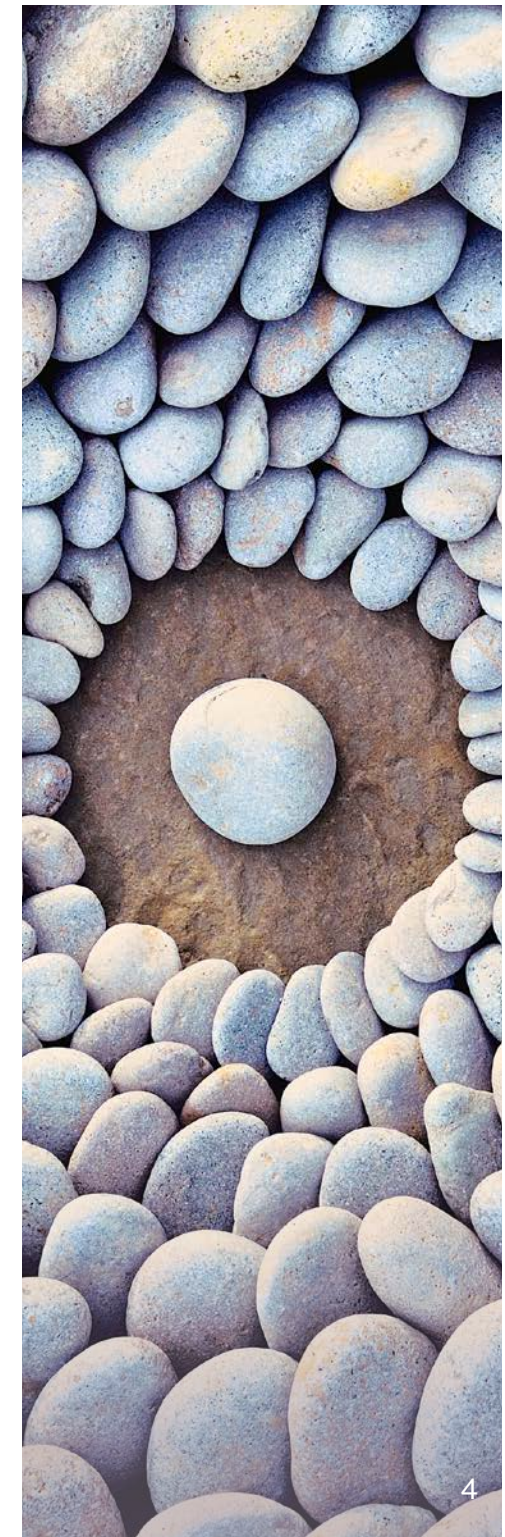
PREPARE FOR STRATEGIC, VALUE-ADDED DISCUSSIONS WITH PROSPECTS/CUSTOMERS AND UNDERSTAND CREDIT RISKS EARLIER IN THE CLIENT ENGAGEMENT.

- Quickly prepare for conversations by reviewing the Industry Profile for your client's or prospect's industry and selecting a few key "Call Prep Questions" to discuss.
- Craft presentations or emails that connect the dots between a specific trend within the prospect's niche, a common industry challenge, or a stated business goal, and your value-added solution.
- Print and share a current industry article from the "News" section as a valuable meeting follow-up or touchpoint.

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[THE RIGHT SOLUTION FOR SALES SUCCESS](#) >

[BACK](#) to the Enterprise





DIFFERENTIATE BY QUICKLY AND EASILY PREPARING FOR MEETINGS WITH SMALL BUSINESS OWNERS.

- Get up to speed on the client's or prospect's industry in just minutes by reviewing the "Call Prep Sheet" and "Call Prep Questions."
- Pass along "Quarterly Updates," timely industry articles, and "Big Picture Videos" on the client's or prospect's industry.
- Provide the client with Industry Intelligence on the industries they call on or that supply them to add even more personalized value to the relationship.

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[PREPARE FOR MEETINGS IN A SNAP](#) 





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CREATE INDUSTRY-SPECIFIC CAMPAIGNS AND CONTENT WITH PROFITABLE INDUSTRIES SUCH AS DENTIST OFFICES, ENGINEERING FIRMS, VETERINARIANS, AND HUNDREDS OF OTHERS.

- Build industry-specific prospect outreach campaigns, collateral, and content to target a desirable niche.
- Develop industry-focused online resources – whitepapers, ebooks, blog posts, or even customer persona-specific website pages – to drive search traffic to your website and nurture existing prospects.
- Identify new markets to target, new places to sell, or new regions to go after (as well as ones to potentially exit) by reviewing “Local Economies.”

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[BUILD YOUR BANK'S BRAND WITH INDUSTRY INTELLIGENCE](#) >





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GET A HANDLE ON PAYMENT CYCLE DATA AND WORKING CAPITAL ANALYSIS WHILE ALSO SAVING TIME WITH TREASURY MANAGEMENT PRODUCT DECISIONS.

- Learn about industry-specific working capital stressors keeping the business owner up at night using “Credit Underwriting & Risks.”
- Incorporate “Call Prep Questions” on working capital into conversations to dig deeper into key cash management concerns impacting financial statistics like payables and receivables.
- Review an industry’s ”Bank Product Usage” as well as the “Banking Solutions” that can help address common industry challenges.

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INDUSTRY INTELLIGENCE OFFERS

A WEALTH OF TREASURY MANAGEMENT INSIGHT [>](#)

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UNDERSTAND BUSINESS CHALLENGES PRIOR TO THE SALE OF A BUSINESS AND THE RESULTING WEALTH TRANSFER.

- Look over the “Credit Underwriting & Risks” to better relate to business owners’ challenges and also help manage investments and liquidity when their company has an off year.
- Examine the “Business Valuation” chapter to help inform conversations on business owners’ succession planning.
- Engage on an ongoing basis with business owner-clients as part of your business development and retention process by sharing relevant industry “News” articles or “Financial Benchmarks.”

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[INDUSTRY INTELLIGENCE ADDS UP FOR WEALTH MANAGEMENT & INVESTMENTS](#) 

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LEARN THE INS AND OUTS OF COMMON TYPES OF EXPENDITURES BY INDUSTRY.

- Gain valuable insights on your client or prospect based on “Working Capital” and the typical spending habits for an industry.
- Capitalize on “Bank Product Usage” to learn which products are most used by companies within a particular niche (helpful information for the banker and useful reconnaissance on the competitive landscape for a prospective client).
- Incorporate data from “Working Capital,” “Financial Benchmarks,” and “News” during client conversations, presentations, and follow-ups.

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[INDUSTRY INTELLIGENCE](#)

[PUTS CARD SERVICES IN CHARGE](#) 

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UNCOVER AND MITIGATE INDUSTRY RISK FACTORS INCLUDING INDUSTRY RISK RATING.

- Study “Credit Underwriting & Risks” to understand issues like economic drivers, regulatory changes, pending legislation, changes in the competitive landscape, and staffing shortages – as well as review the Industry Risk Rating.
- Get familiar with “Capital Financing” including typical start-up costs, plus the equipment and technology needed to outfit a business within the industry.
- Compare a specific company’s performance to that of their industry peers using “Financial Benchmarks,” and assess the health of a business’s local market using “Local Economies.”

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[CREDIT UNDERWRITING CAN CONNECT THE DOTS WITH INDUSTRY INTELLIGENCE](#) >

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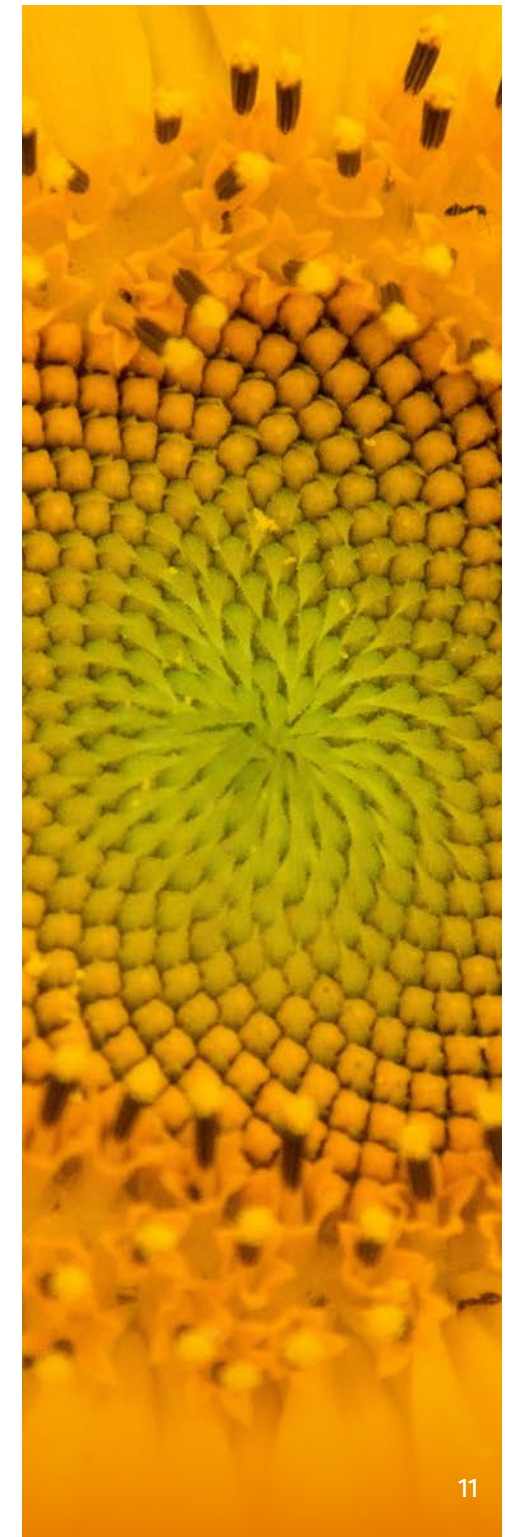
PREPARE FOR INITIAL DISCUSSIONS WITH BUSINESS OWNERS AND UNDERWRITE RISKS BASED ON MARKET POTENTIAL USING MACROECONOMIC DATA.

- Simplify your approach to research with information that is easy to synthesize, and objectively analyze deals by leaning on Industry Intelligence.
- Use Industry Profile chapters like “Credit Underwriting & Risks,” “Working Capital”, and “Business Valuation” prior to meetings to glean in-depth details of how firms within a niche operate.
- Evaluate global markets and expansion opportunities using the “Global Perspective” chapter.

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PRIVATE EQUITY INFORMED
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SCORE LOANS WITH GREATER PRECISION USING INDUSTRY RISK RATINGS, FINANCIAL STATISTICS, AND LOAN DEFAULT RATES.

- Review the “Credit Underwriting & Risks” chapter to thoroughly analyze issues that may impact creditworthiness, including exogenous risk factors, and gather salient information from the business using industry-specific questions.
- Inform lending decisions with our proprietary Industry Risk Rating, key performance metrics, and financial ratio, and utilize the Financial Comparison Toolkit to objectively compare your client’s financial metrics to industry averages.
- Learn which loan products are commonly used by businesses within the industry in the “Bank Product Usage” chapter.

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[GIVE SMALL BUSINESS PLATFORM LENDING A CLEARER VIEW WITH INDUSTRY INTELLIGENCE](#) >





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EXAMINE ISSUES RELATED TO WORKFORCE, SUCH AS EMPLOYEE TURNOVER, WITHIN A PARTICULAR INDUSTRY.

- Understand how “Industry Trends” can directly impact employee satisfaction and retention, share those insights with your client, and offer the right products and services to address those challenges.
- Survey the industry landscape, have more engaging conversations, and provide solutions that truly move the needle for the client by asking the “Call Prep Questions.”
- Show the client that you are in tune with their industry and looking out for them and their business by utilizing industry “News” and current events as part of your business development and retention efforts.

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[GET GROUP BANKING ON TEAM INDUSTRY INTELLIGENCE](#) 

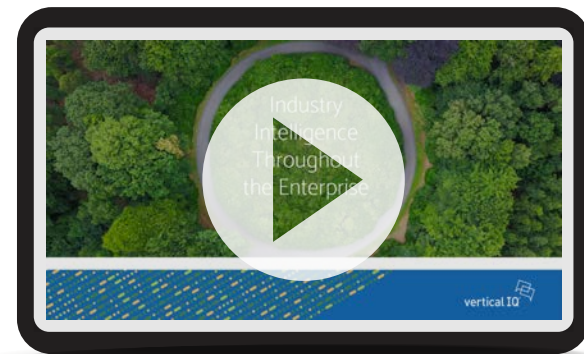
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INDUSTRY INTELLIGENCE IS ABOUT MORE THAN JUST SMALL BUSINESS AND COMMERCIAL BANKING CALL PREPARATION (THOUGH IT IS A GREAT TOOL FOR THAT!).

Industry Intelligence offers value across the entire bank enterprise, from the credit underwriting team and group banking to wealth management and card services – and nearly every line of business in between. Save bankers’ time, boost their confidence, build credibility, and deepen relationships, all with just a little help from Industry Intelligence!



[VIEW FULL WEBINAR](#)

About Vertical IQ

Headquartered in Raleigh, N.C., Vertical IQ is a nationally recognized leader in Industry Intelligence.

Whether they're pitching a local brewery or a national biotech company, successful sales and marketing teams use Vertical IQ to better understand a prospect's or client's business challenges before, during, and after sales meetings. Covering more than 530 distinct industries, 3,400 local economies, and more than 90 percent of the U.S. economy, Vertical IQ equips users with the confidence and credibility to make memorable first impressions and sustain enduring relationships.

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