

## Helping you to maximise the return on your resources



**City Fios is a Financial Services Consultancy founded in 1998 by ex-banking professionals. The company has extensive knowledge and experience across functional and product areas, with particular expertise in the provision of performance management and client revenue data to sales and distribution teams within client organisations.**

**“Implementing a leading edge Client Value System for Global Markets was a key component of our sales strategy. City Fios told us how and when they would do it and then came in and did exactly that. That is a rare service and they are to be commended for it.”**

Thomas Leicher,  
Co-Head of Global Markets Sales in Europe for WestLB AG

## The Fios Solution

The Fios Solution caters for all aspects of client value tracking, from client set-up, through trade capture to analysis of sales performance. It quantifies the value and sales history of individual clients.

By examining which of the bank's staff work on each transaction, the level of sales and marketing input and the contribution made by staff in other offices around the world, Fios users can be aware of the precise value of each of their clients.

The logo for Cityfios, featuring the word "cityfios" in a lowercase, sans-serif font. The letter "i" in "fios" is replaced by a stylized diamond shape with a smaller diamond inside it, resembling a financial symbol or a gemstone.

Call: +44 (0)20 7539 3060  
or visit: [www.cityfios.com](http://www.cityfios.com)

## Successful implementation of the Fios Solution

WestLB's Global Markets Division takes on board a key component in its sales strategy.

WestLB AG is a European wholesale and commercial bank with firm roots in North Rhine-Westphalia, Germany's most densely populated federal state. With Group total assets of €267.9 billion, as at June 30 2008, it is one of Germany's leading financial services providers.

WestLB's Global Markets Division used a number of client revenue tracking systems within its product silos, resulting in fragmented information that failed to provide management with the insights necessary to gauge the effectiveness of the organisation's client facing operations.

The full project was implemented on a fixed price basis and completed on schedule.

**"I have experienced many projects in this industry and City Fios were unusual in that they stuck to the promises they made. Now that the system is live we are seeing the results in fast, high quality data."**

Heiner Boehmer, Head of Business and Finance Support for WestLB AG



### Implementing the Fios Solution brought immediate benefits:

- All client business across Financial Markets, Cash Equities and Equity Derivatives was integrated within a single system
- Client revenue, targets and actual P&L information could be tracked and reported from the combined system
- Client and organisational data was integrated with in-house source systems
- Transaction flow from source trading systems through to Fios was fully automated with exceptions managed through an efficient workflow process

**"We are ex-banking professionals and therefore understand many of the dilemmas confronting senior management. It means that we can work more closely with our clients in the securities industry, helping them to design and implement better honed solutions which can be dovetailed into their business planning and management processes."**

Paul Byrne, City Fios Partner