

# SYMPHONY

## FOR CORPORATE BANKING

### KEY USE CASES

1. **Discuss / track updates and action items within client coverage teams via chatrooms and 1:1 chats.** This reduces complex email flows, while keeping everyone on the same page. @mentioning specific individuals calls out their attention / action, sending them an additional notification on Mentions. The mobile app also allows you to reply to messages on the go
2. **Filter through client firm-specific contents that are important to you via tagging and signals.** Capture real-time updates on your client firms based on personalized #hashtags for sector or firm names, or \$cashtags for firm tickers
3. **Stay on top of news relating to your clients via third party news applications.** Supplement your team updates with market data, all within Symphony
4. **Get notified when your team members make changes to your client relationship management portal by integrating Symphony with the CRM platform.** Never miss any new client information or updates from your client coverage team by receiving real-time status updates from the integrated CRM platform
5. **Automatically receive a list of in-house or external research pieces with hyperlinks via a research bot**
6. **Automatically pull client information in Symphony and get alerted with information changes in CRM platform, via a CRM bot**

### RECOMMENDED ROOMS

- Corporate Banking [Region] Team Chat (e.g. Corporate Banking Americas Chat)
- [Firm Name] Coverage Team (e.g. General Motors Coverage Team)
- [Region] [X Sector] Chat (e.g. EMEA Tech Sector Chat)
- Corporate Banking / Operations Room

### RECOMMENDED USER DESKTOP SETUP

- **Text layout:** normal font size, spacious info density, and standard 'time ago' format
- **Folder organization:** place chats into critical vs informational folders, and create a VIP folder for your boss or other senior leaders to quickly notify you when they ping
- **Workspace:** keep important client coverage rooms pinned to get live feed of conversation. Also keep the relevant client signals pinned to stay on top of news

# SYMPHONY

## GET STARTED WITH #TAGGING FOR CORPORATE BANKING

### #HASHTAGS FOR CORPORATE BANKING

#### GENERAL

#ToDo  
#ToRead  
#Portfolio[Name]  
#Project[Name]  
#Urgent  
#SOD (start of day)  
#EOD (end of day)

#### PRODUCT / SERVICES

#loan  
#realestate  
#payroll  
#credit  
#cashmanagement  
#tradefinance  
#investment  
#wealthmanagement

#### REGIONS

#APAC  
#LATAM  
#AMERICAS  
#EMEA

#### CLIENT COVERAGE

#GM  
#Apple  
#Ford  
#CVS  
#IBM  
#Fortune500

#### TRANSACTIONS

#moneytransfer  
#payment  
#expenseclaim  
#openaccount  
#invoice  
#deposit

#### CONTENT TYPE

#8K  
#10Q  
#MustRead  
#Trending  
#CN (company-specific)  
#ERN (earnings)