

# ModuleQ for Relationship Managers in Banking

## Customer-centric insights delivered directly into Microsoft Teams

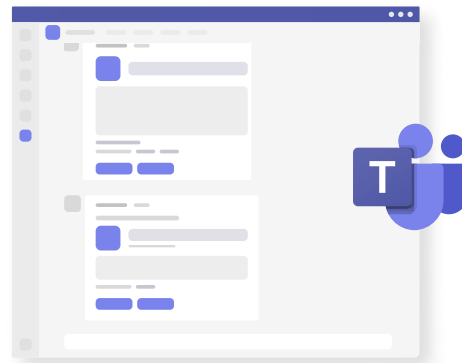
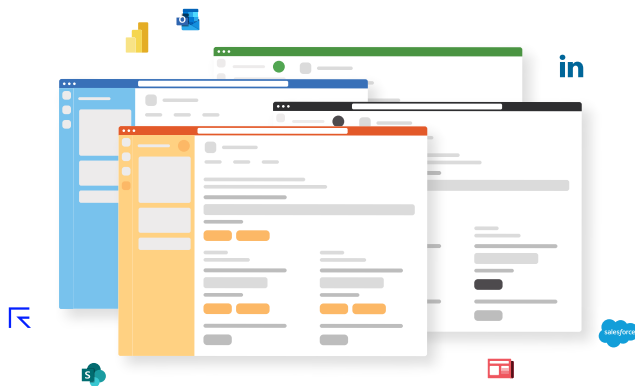
Relationship Managers (RMs) need relevant, high-quality, up to the minute information to provide outstanding service to their customers. The best way to do this is by augmenting their workflow with proactive customer insights. Personalized insights lead directly to higher quality conversations. According to a [Gallup](#) 2021 poll, high-quality conversations lead to significantly higher sales conversions (59% to 14%).

Accenture's [Workforce 2025 research report](#) found that the North American banking sector could unlock up to \$59 billion in productivity gains through AI augmentation.

### Without AI Augmentation

vs.

### With People-Facing AI



#### Disconnected portals and systems

RMs spend excessive time looking for the right content for customers, through portals, websites, and other third-party applications.

#### Single insights hub in Microsoft Teams

Find the signal in the noise for your RM team by surfacing personalized insights and content based on the context of their work.

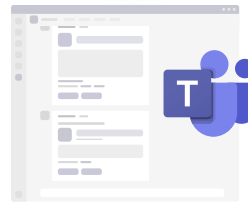
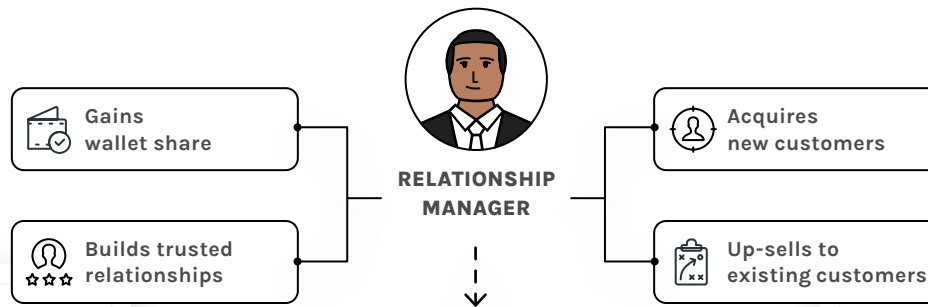
## REFINITIV AI ALERTS

Powered by ModuleQ, Refinitiv AI Alerts enables users to stay on top of the market-moving information that matters most, when it matters most.


**Fully integrated into an individuals priorities:** Refinitiv AI Alerts sends relevant and personalized content within Microsoft® Teams that is based on personalized priorities.

**Seamless alignment to your business needs:** Refinitiv AI Alerts delivers the information in a packaged report before important meetings and events, so each RM is armed with the latest news, internal data, and current collateral.

**AI surfaces opportunities to call:** Each RM builds a unique profile around accounts, topics, or geographies, that allows them to monitor credit, identify market trends, and respond to outreach opportunities.



Manages RM responsibilities by transforming Microsoft Teams into an Insights Hub



### Meeting with American Airlines

**Subject: Account Review**  
8:00 - 9:00 am Microsoft Teams Meeting  
Attendees: Jone Delyth, Azra Imamu and 6 additional attendees.

[Join Now](#)

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**View in Salesforce**

[Account](#) | [Opportunities](#) | [Contacts](#) | [Tasks \(1\)](#) | [Log Call](#)

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**Account Insights**

**Credit Status** Drawn: \$425M (85%) | Remaining: \$75M (15%)

**Credit Rating** **Aa** according to Moody's

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[American Airlines confirms data breach](#)

[American Airlines Group Inc. stock rises Thursday, outperforms market](#)

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**Collateral Recommendations**

[Guide - Investment Solutions Yield on Cash Balances](#)

[Updating Product Offering - Business Credit Card Program](#)

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### New Content and Collateral


[Guide - Investment Solutions Yield on Cash Balances](#)

[Updating Product Offering - Business Credit Card Program](#)

[Win Wire - Marriott International](#)

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### Morning Update



**What Marriott's CEO Says About the Prospect of Another Mega-Merger**  
Yahoo Finance 12h ago  
Related to: [Marriott International Inc](#)

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You've noted this as **useful**.

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**Content Recommendations**

[Dataset - Account Monitoring Credit Rating Dashboard](#)

### Internal Collateral

- Get content out of email and into RMs hands
- Increase internal content usefulness and engagement

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### Breaking Alert: T-Mobile sells wireline business to Cogent for \$1, expects hefty charge

Sept 7 (Reuters) - T-Mobile US Inc (TMUS.O) is doubling down on 5G services after it struck a deal on Wednesday to sell its wireline business to Cogent Communications Holdings Inc (CCOI.O) for \$1, while taking a \$1 billion charge on the transaction. The deal includes a \$700 million...

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I found more news about [T-Mobile](#)

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### Pre-Meeting Briefing

- Preparation to execute meetings well every time
- Customized deep links into third-party apps
- Collateral recommendations matched to the opportunity, personas and meeting agenda
- Most recent company news, executive changes, earnings, and account insights

### Daily Updates

- Creates outreach opportunities
- Proactive monitoring of hundreds of news sources
- Alerts to news related to RMs accounts, topics, geographies, and more

### Breaking Alerts

- Be the first to see press releases for accounts
- Integrated Refinitiv's Significant Developments feed