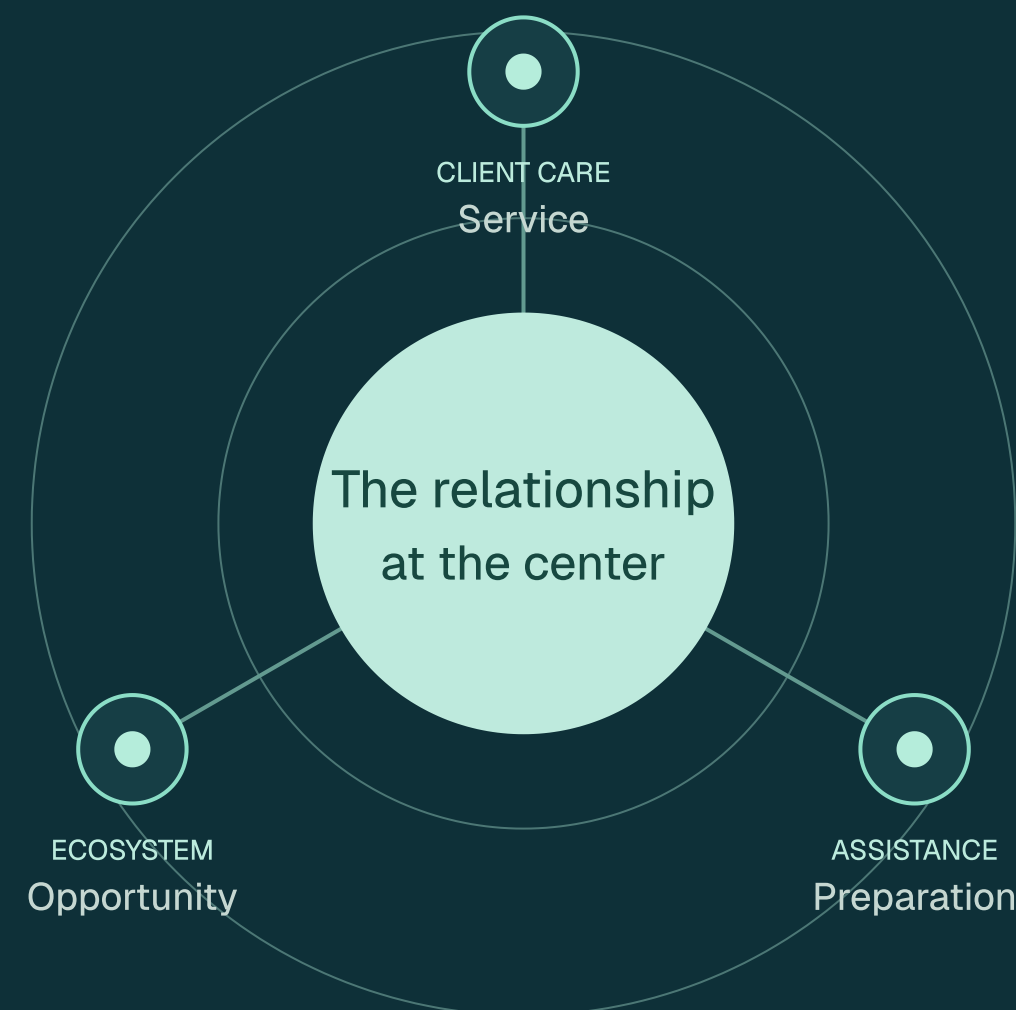


FOR RELATIONSHIP MANAGERS & SALES

Better prepared. More attentive. More connected.

Use the Hybrid Banking foundation to make client service easier to follow and new opportunities easier to evaluate.

HYBRID BANKING / A CONNECTED BANKING ECONOMY



01 / RELATIONSHIP BEFORE PRODUCT

Start with the client's next need.

“I need to pay a supplier, understand my portfolio
and get help with a card request.”

An everyday task

Prepare and follow a payment request.

A financial question

Bring available portfolio and research
information into view.

A service conversation

Keep the request, response and status
together.

Keep the conversation with the work.

- 01

Secure conversations

The pilot includes encrypted client/team messages, assignment, replies and resolve/reopen status.
- 02

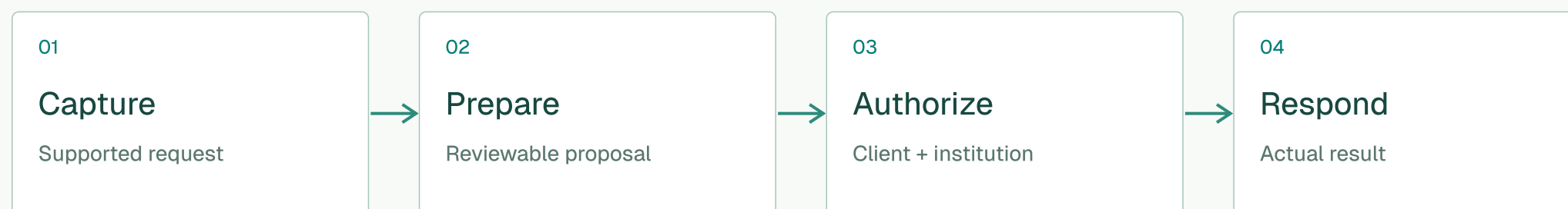
Visible follow-up

Notifications and service-request review help the team find the next action.
- 03

Accountable history

Immutable messages and private audit records preserve the conversation context.

Prepare the routine. Spend attention on the relationship.



Consistent preparation

Reduce repeated assembly of information.

Clear responsibility

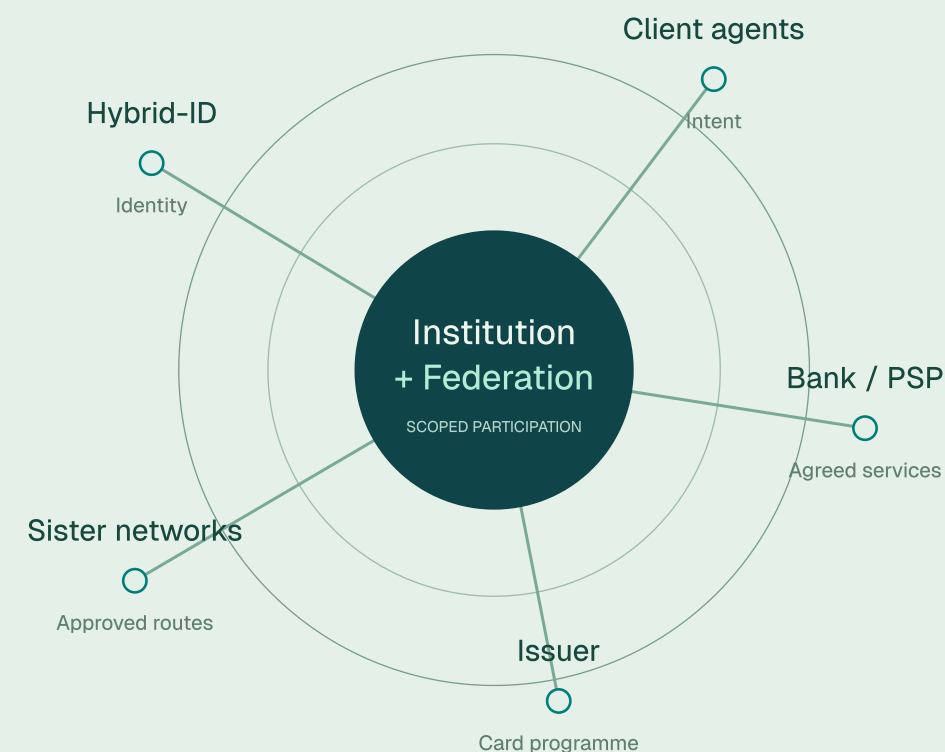
Keep approvals and access boundaries explicit.

Measured improvement

Compare manual touches and response time.

Connect the need to an approved capability.

01	Understand demand	Choose a client journey worth supporting.
02	Evaluate the partner	Confirm service permissions, agreement and data boundaries.
03	Accept the connection	Test the route, controls and operating ownership.



A working foundation. A focused next layer.

AVAILABLE IN THE PILOT

Client service and controlled workflows

Account and request context, secure messages, team assignment, notifications, payment review and portfolio/order instructions with explicit limits.

PROPOSED ENHANCEMENTS

A dedicated relationship workspace

Assigned-client overview, a relationship work queue, client-service commitments and approved opportunity follow-up. Define ownership and consent before implementation.

Make better service observable.

Service quality

Time to a useful first response; unresolved request age; avoidable repeat contacts.

Operating capacity

Preparation time, handoffs and exceptions per completed journey.

Business opportunity

Adoption of an accepted service and institution-specific unit economics.

Use actual pilot observations. More platform activity does not automatically mean client value or revenue.

07 / A PRACTICAL START

Choose one client journey.

Connect a clear service need to the pilot foundation. Agree the required relationship-workspace enhancements and any partner connections with OVRIDE.

[Explore the team demo ↗](#)[Explore the ecosystem architecture ↗](#)[Discuss your institution ↗](#)

Explore with fictional records. Discuss the institution's required controls and connections before moving to real financial services.