**HSBC Opportunity Information**

Opportunity ID: XFR0001

Opportunity Name: Lending - Loan Origination System

Opportunity Stage: Proposal

Opportunity Description: Developing analytic capabilities for the loan origination system

Opportunity Value: $250,000

Opportunity Close Date: 11/30/2024

Customer Contact: John Smith

Customer Contact Role: VP, Information Technology

**Activity Summary**: We have had several meetings with HSBC's lending team regarding replacing the analytics engine for their lending solution. The current system is slow and inflexible. They have the renewal coming up with the existing vendor next year so there is urgency regarding the decision process.

**Next Steps**: Meet with John on 10/18 discuss next steps in the decision-making process, potentially moving towards a pilot program or final negotiations.

Opportunity History:

# HSBC Opportunity History (XFR0001)

**## Meeting 1: Initial Discovery Call**

- Date: August 15, 2024

- Attendees:

- HSBC: John Smith (VP, IT), Sarah Johnson (Head of Lending)

- Our Company: Michael Brown (Account Executive), Emily Davis (Solutions Architect)

- Duration: 60 minutes

- Key Points Discussed:

- HSBC's current challenges with their loan origination system

- High-level overview of our analytics capabilities

- Initial discussion on potential integration points

- Outcome: HSBC expressed interest in a follow-up meeting for a deeper dive into our solution

**## Meeting 2: Technical Deep Dive**

- Date: September 3, 2024

- Attendees:

- HSBC: John Smith (VP, IT), Mark Wilson (Senior Systems Analyst), Lisa Chen (Data Scientist)

- Our Company: Emily Davis (Solutions Architect), Alex Rodriguez (Technical Lead)

- Duration: 90 minutes

- Key Points Discussed:

- Detailed walkthrough of our analytics engine architecture

- Discussion on data migration and integration processes

- Exploration of customization options to meet HSBC's specific needs

- Outcome: HSBC requested a proposal outlining potential implementation scenarios

**## Meeting 3: Proposal Review and Q&A**

- Date: September 25, 2024

- Attendees:

- HSBC: John Smith (VP, IT), Sarah Johnson (Head of Lending), David Thompson (CFO)

- Our Company: Michael Brown (Account Executive), Emily Davis (Solutions Architect), Rachel Kim (Client Success Manager)

- Duration: 75 minutes

- Key Points Discussed:

- Presentation of our proposed solution and implementation plan

- Discussion on ROI and expected performance improvements

- Clarification on pricing structure and contract terms

- Outcome: HSBC team to review internally and schedule a follow-up for any additional questions before moving to the next stage