AKA Enterprise Solutions

SERVICE OFFERING

FINANCIAL SERVICES

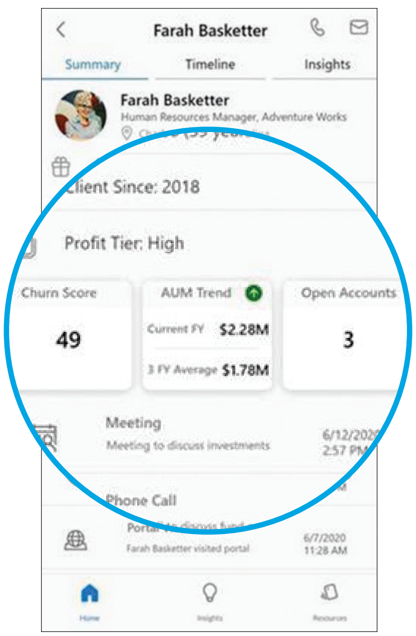
# Customer Insights Quick Start for Wealth Management Firms

Financial advisors are in a highly competitive market, particularly during times of volatility. The two biggest adversaries are churn and robo-advisors. The key to coming out ahead is offering value that cannot be delivered by anyone else—value that will keep your clients happy, loyal, and sharing your name with their friends.

## CREATING PREDICTIVE RELATIONSHIP MANAGEMENT

Clients today don't want to be lumped into categories like "value" or "growth." They don't just want to know what to buy or sell. What they want and need cannot be provided by robo-advisors; they need a true, human advisor who can look ahead and not just recommend what to do during a disruption in the current market, but actually *reach out proactively.* That requires two things:

1. Developing and maintaining a real relationship that only a human can provide, and
2. Figuring out how to predict what's going to happen




The first one is not as easy as it might seem. You probably know your clients, but do you understand each one well enough to have a truly meaningful relationship? Do you know what's happening in their lives currently, both personally and professionally? Their plans or dreams for the future? At risk of going to another advisor?

Even if you know all that, you still can't predict what's going to happen with CRM. CRM software, while powerful in many ways, falls short of being able to deliver predictive insights. Microsoft Customer Insights does just that, adding a value layer to any CRM—leaving it right where it is—that can consolidate data from anywhere, including CRM and other back-office sources, without the need for significant integration or development efforts.

But what if you had a tool that could help you predict the future? Microsoft Customer Insights can help you do just that. It looks at market data, strategies, world and local events, major life events, and even the day-to-day

## 1.5 DAY QUICK START

Our 1.5 day Quick Start engagement introduces you to the concept of a Customer Data Platform (CDP) strategy. We will connect with your team to discover the basic elements you need to know about your clients and where all your client data is today. We will then work together on a Customer Insights prototype dashboard using your data, so you can see the true potential of this tool and how easy it is to implement. The goal is to help you take the first steps towards a customer data-driven strategy.

**Our Offering Includes:**

> Discovery workshop to understand your client data and what is important for your organization to know about them.

> A Customer Insights prototype dashboard in a sandbox environment, including:

- Sample data uploaded from up to 2 sources using Excel-based sources
- Configuration of basic customer profiles and measures using the data sources and data elements identified during the discovery workshop session
- A walkthrough of the Customer Insights dashboard

**Resources and Pricing**

The engagement will include a Customer Insights Architect and a Financial Services practice specialist.

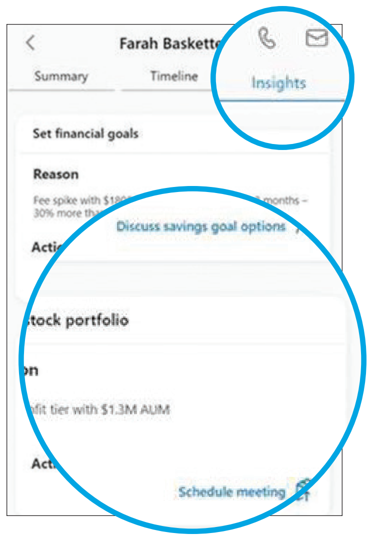
Price: US $5,000

events you see on social media, linking those data sources and applying artificial intelligence (AI). Then, using either the algorithms provided out of the box or specific parameters and triggers determined by you, Customer Insights gives you access to true, predictive relationship management, so you can be a *strategic* advisor.

## BENEFITS: CLIENTS FOR LIFE

> By getting in front of all the relevant data—regardless of source—you become a strategic advisor who, in turn, helps clients stay ahead of the curve. Customer Insights takes care of aggregating the data and presenting it in a rational, business-focused format.

> With the ability to set triggers, you can ensure action is taken on trends or other events, so you—nor your client—miss an opportunity. Customer Insights uses AI and machine learning to understand your clients' behaviors, likes, dislikes, and makes the appropriate recommendations to proactive action. You're no longer reactive!




> You have the ability to build on those precious, human relationships, focusing on helping them achieve their goals and live their dreams. The Customer Insights tool is always working in the background, analyzing data, and doing its job, letting you focus on what you're great at: building relationships! That's how you win a client for life.

### Why AKA?

For more than two decades, AKA Enterprise Solutions has been dedicated to making it easier for asset and wealth management companies to do business and innovate their way to greatness by using technology to simplify processes and reduce risks. Specializing in Microsoft Dynamics 365, cloud services, business process consulting, and custom application development, we combine industry and technical experience, proven methodologies, and world-class consulting to help organizations achieve their goals. The company is headquartered in New York, NY, with team members located throughout the U.S.

### ABOUT AKA ENTERPRISE SOLUTIONS

AKA specializes in making it easier to do business, simplifying processes and reducing risks. With agility, expertise, and original industry solutions, we embrace projects other technology firms avoid—regardless of their complexity. As a true strategic partner, we help organizations slay the dragons that are keeping them from innovating their way to greatness.

AKA Enterprise Solutions

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