the results company

**SERVICE BRIEF** | Financial Services

# Customer Insights ***4 to 5-Week Engagement*** for Asset Management Firms

*As an asset management firm today, you don't lack data, but you probably lack the tools to get solid, actionable insights that will help you make smart decisions regarding consultants, clients, and advisors. Without the understanding of that data, you are unable to identify opportunities and areas of vulnerability, leaving business on the table for a competitor to grab.*

### Surfacing Big Tickets for Next Best Action

The goal of intermediaries is to target specific wholesalers to ensure every opportunity or vulnerability is being addressed. One area to target is big tickets. It is easy to identify a big ticket coming from a data flow/pack and the office it came from, but not much more.

Most wholesalers rely on those with tribal knowledge. If the expert leaves your firm, that knowledge is lost. You need the ability to:

- Identify the source—down to the specific advisor—of the big ticket
- Identify whether the big ticket is a BUY or a SELL
- Determine if the wholesaler has had any influence on that trade by evaluating relationships, determining recent activities with advisors in that office, etc.
- Decide on a next best action:
  - SELL: Is there a change in strategy, or risk of losing wallet share?
  - BUY: Thank them for their business and investigate any complimentary strategies with other clients

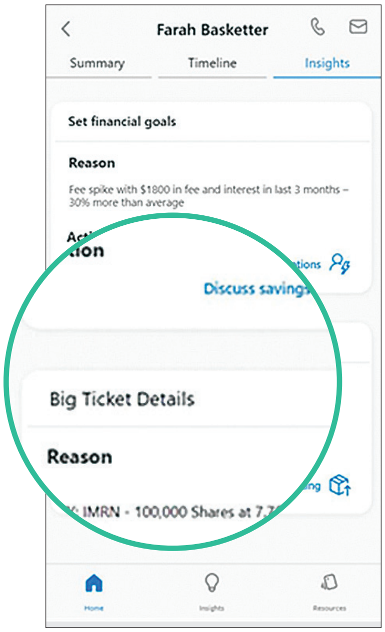
Customer Insights bridges the gap between data and insights. It consolidates data from anywhere, including your CRM and back-office sources, without the need for significant integration efforts. It then links those data sources and applies AI and publicly available information to enhance that data.

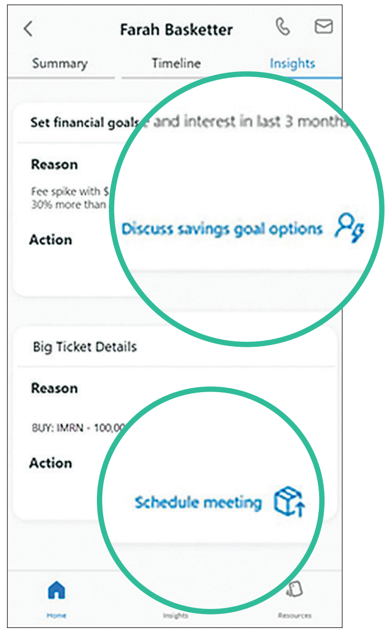
**4 to 5-Week Engagement**

**Goal: Help you take the first step towards a customer data-driven strategy**

- Introduces 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 your client data is today
- We will then work together on a Customer Insights prototype dashboard using your data to demonstrate its potential and ease of implementation

You can then drill down on that data—by advisor or office— viewing combined, holistic data, including wallet share, product types, and transactions over time, to gain powerful insights and recommendations on next best actions, which are delivered or displayed on whichever tool you have in place. Customer Insights even pulls in data based on holdings or financial accounts, like public or life events, that could be impacting a particular holding or account.




Armed with those recommendations, you can decide whether to make a call, send a marketing email (Customer Insights even recommends what the email should contain), or follow up accordingly.

### Benefits: No Opportunity Missed

- Democratizing information increases flow and efficiency, enabling all wholesalers in the firm to take advantage of institutional knowledge that previously was in the heads of the veterans.
- You no longer have to guess at what to do with a critical piece of information, such as a big ticket. You can quickly identify who is making the trade and can reach out to them in the appropriate way, reducing the chance of a missed opportunity or a lost client.

## 4 to 5-Week Engagement

**Our Offering Includes:**

- Discovery workshop to review up to 3 of your main data sources (Campaign management solution, Financial solution, and third-party data aggregator) and identify the KPIs that are critical for your business and the data elements needed to generate them
- Configuration of Sandbox and Production environments
- Creation of data storage entities and upload procedures
- Configuration of customer profiles and measures using the data sources and data elements identified during the Discovery workshops
- Configuration of Power BI dashboard with up to 3 different views that will provide visual and detailed access to the Metrics and KPIs defined during the Discovery workshops
- One User Admin training session and one End-user training session

**Resources and Pricing**

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

Price: US $50,000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