

WE KNOW ASSET MANAGEMENT

By 2020 the asset management industry will rise to \$101.7 trillion, a compound growth rate of nearly 6% according to PwC. Those that succeed, and share in a larger portion of that growth, will recognize the need to build a “modern sales force”, and communicate in a way that advisors increasingly demand - *digitally*. As more Gen Y and Millennials enter the workplace, asset managers need to rethink business models to sell and distribute funds in online and mobile environments. Modern firms will leverage analytics to uncover hidden cross-sell revenue opportunities, identify new advisors and help mitigate redemptions. To support the digital-age, asset managers will be challenged to create distribution efficiencies that allow them to grow AUM and net flows, reduce sales and marketing costs - all while delivering value.

ASSET MANAGEMENT BUSINESS CHALLENGES

Advisor Acquisition

Today, asset managers aren't adequately leveraging analytics and data to identify new potential advisors. In addition, wholesalers are challenged with identifying and engaging RIAs - the fastest growing channel.

Advisor Retention

Lack of visibility into advisors use of online channels means predictive churn signals are missed or alerted too late for marketing and sales to react. In addition, ease of business is driving more advisors to tech-savvy competitors.

Advisor Cross-sell

Asset managers are not capitalizing on the greatest asset for revenue growth; **their own customer base**. They are missing opportunities to promote additional funds that work within the context of their current strategies.

Underlying Infrastructure

Despite an explosion in data sources, asset managers are still struggling to develop the right insights, and to distribute those insights to their wholesalers to more effectively attract, grow and retain advisors.

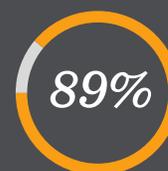
WHAT ASSET MANAGERS WANT



prioritize investments in technology/infrastructure¹



believe that data and analytics are the most effective means for engaging customers²



are reviewing how they manage their brand, marketing and communications in response to stakeholders²

We can get you there. But how? Keep reading...

POWER UP

Sales Plays,

BLOW AWAY

Sales Targets

We believe a combination of data, analytics and content is key for Asset Managers to more effectively engage existing advisors, and to more efficiently acquire new advisors. Our solutions enable today's Asset Managers to capitalize on 100s of customer data points to reach higher quality prospects, ensure advisor retention and cross-sell new funds.



OUR PROCESS



AGGREGATE

data & content

ANALYZE

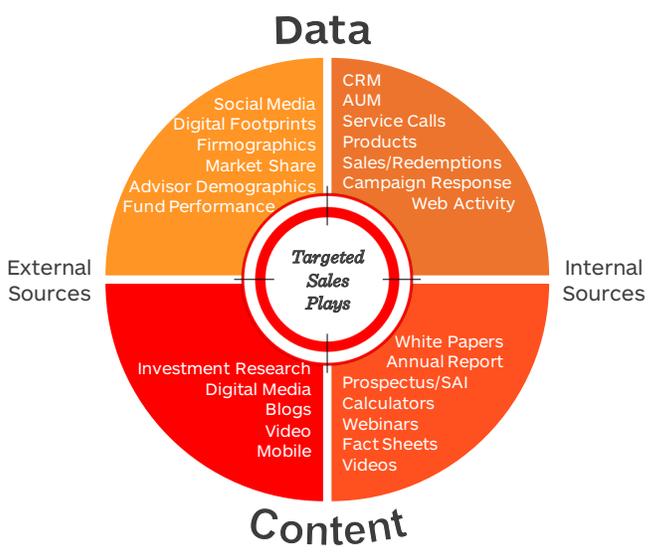
data to develop highly prescriptive insights

ACT

on those insights through marketing campaigns & sales plays powered by technology

- Who to target
- When to target
- What message and content to deliver

- Advisor Acquisition
- Cross-Sell/Upsell
- Advisor Retention



CALL US TODAY TO GET STARTED:
1.888.GO.TO.MKT

1 "Managing complexity and change in a new landscape," EYGM Limited, 2014
2 "19th Annual Global CEO Survey," PwC Global, 2016