

# Angoss Fundguard®

A leading Investment Company Taps Angoss FundGUARD™ to Boost Sales Effectiveness and Grow Assets Under Management



With over thirty years of investment experience and \$85 billion in assets under management for institutional and private clients worldwide, the Toronto-based Mutual Funds Company is no stranger to the unique challenges of growing and retaining assets through a wide and varied distribution network of financial advisors.

## Segment your Advisors and Clients to Optimize Sales and Marketing Strategies

As a mutual funds distributor, this Toronto-based company market funds through a vast network of independent financial advisors. While successfully growing their portfolio, marketing through this channel poses a number of sales optimization challenges. The sheer number of individual advisors coupled with the challenges of wide geographies and multiple territories meant that sales coverage needed to be prioritized. In order to prioritize effectively, the client needed to better understand how each segment of their business was growing, with insight into the purchasing and redemption patterns of each.

It was also critical for them to be able to understand buying and redemption behavior right down to the level of individual advisors. Knowing which advisors were most likely to buy or redeem further enabled them to align their sales team with actionable intelligence and increase revenue opportunities. As asset retention strategies are more effective if applied early, this client was also keen for an early warning on advocates whose interest may be waning.

To meet these requirements, Angoss FundGUARD was selected to deliver the insight to retain and grow their assets under management and optimize sales team effectiveness. FundGUARD is an on-demand predictive sales and marketing optimization solution for mutual fund and wealth management organizations.

“Our implementation experience with Angoss was excellent. FundGUARD was live and in production within weeks,” recalled the Project Manager. “Our sales team – the largest project stakeholder – was quick to recognize the value of the solution.”

Using FundGUARD, this Mutual Funds company has been able to grow assets under management while implementing a solution that the sales team can use to complement their process. FundGUARD couples their own sales data with descriptive and predictive analytics. Using this approach, FundGUARD segments their advisor channel according to buying and redemption patterns and generates lists of advisors most likely to purchase or redeem in the next thirty days. FundGUARD also combines predictive results with their own sales data to present an interactive BI dashboard and business-friendly trend reporting on sales performance by territory and segment.

With an emphasis on demonstrable ROI and ‘closedloop’ implementations, FundGUARD also reports on the actual coverage of leads generated by the application – and the value of these for the client.

“We’re using the predictive leads delivered through FundGUARD to complement our sales process with the end result being material improvements in assets under management. Equally important for us, however, is the ability to use its interactive segmentation and territory sales reports to help make our direct and indirect sales teams more successful. Used in sales operations, FundGUARD is improving sales effectiveness and is a critical tool for our sales management to maximize potential revenue.”

## About Angoss Software

As a global leader in predictive analytics, Angoss helps businesses increase sales and profitability, and reduce risk. Angoss helps businesses discover valuable insight and intelligence from their data while providing clear and detailed recommendations on the best and most profitable opportunities to pursue to improve sales, marketing and risk performance.

Our suite of desktop, client-server and in-database software products and Software-as-a-Service solutions make predictive analytics accessible and easy to use for technical and business users. Many of the world's leading organizations use Angoss software products and solutions to grow revenue, increase sales productivity and improve marketing effectiveness while reducing risk and cost.

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