

FundGUARD solution supports a diverse set of advanced analytics modules for mutual fund and wealth management industry organizations to optimize their marketing and sales effectiveness.

Sales and Marketing Modules

Advisor Value Segmentation

Customer value segmentation is the first step in formulating effective strategies toward making the right investments. Analyze sales and marketing history with data mining and business intelligence software to define and describe your customer segments according to their current purchases, costs to serve, future value, and wallet share.

Advisor Behavioral Segmentation

Understand the profiles and key behavioral triggers of your financial advisors by utilizing monthly transactional and activity data, web behavior, campaign response, and tenure. This is typically to develop the right messaging.

Cross-Sell Campaigns

Identify products or services that complement ones a particular customer has purchased and recommend ones based on product uptake at similar customer accounts. Your existing customers present an excellent opportunity to grow revenues through cross-sell strategies—without the significant costs involved in acquiring new customers.

Upsell Campaigns

Identify products or services that are recommended upgrades for particular customers based on their purchases and overall position. Your existing

customers present the best opportunity to grow revenues through upsell strategies while avoiding the significant costs involved in acquiring new customers.

Next Best Offer

Apply predictive analytics to customer data to identify trends in purchase behaviors and product affinities. Use product affinities to recommend other products or services customers may be interested in. Apply customer responses to future targeting and messaging criteria to provide relevant content that addresses customer needs. Predicting the next product or service customers are most likely to be interested in not only improves customer lifetime value but also supports profitable and long-term customer relationships.

Advisor Loyalty and Retention

Understand the factors that directly affect advisors likelihood to maintain, grow, or redeem assets in a given fund and across all funds. The goal is to understand advisor personas in order to be able to modify behavior and increase customer lifetime value. Drivers include, among others:

- Sales touchpoints
- Advisor demographics such as firm, licenses and tenure
- Funds held, including the cross influences of products
- Marketing touchpoints such as portfolio advisor visits/calls and website engagement
- Fund performance as compared to market and other factors.

Marketing Effectiveness

Examine marketing initiatives such as campaigns, websites, and road shows and their influence on short and long term outcomes in terms of gross purchases, assets and net cash flow.

Fund Acquisition

Target advisors of newly acquired companies to transfer fund holdings by providing them similar or same funds offered by your company. Comparison analysis will look at a wide variety of structural characteristics of funds such as:

- Investment theme
- Size and age of fund
- Portfolio manager tenure
- Cash position
- Portfolio concentration and turnover
- Market capitalization
- R-squared, Beta and gross dividend yield

Asset Lifecycle Analytics

Analyze assets over time held by advisors to understand asset flows within and across mutual fund products and in and out of mutual fund products. Understand the profiles of advisors who are at risk of moving significant chunks of their business elsewhere, or of not growing their business with your company.

Channel Analytics

Study the interplay between channel and asset stickiness to gain insights into:

- Are broker-dealer channel-generated assets less sticky than those generated by independent financial planners?
- Are there sub-types in each channel that reverse this trend?
- Which channels can be leveraged most effectively for new business?
- Which marketing strategies are most effective across each channel?
- What can the business understand from its data about the drivers of differentiated behaviors within each channel?

Attitudinal Segmentation and Extrapolation

Gather survey data on advisors, existing channel partners and prospective partners to achieve attitudinal insights that are valuable in growing existing relationships, and can be used to inform targeting decisions for new advisors. The data is collected on a sample of clients and prospects and then extrapolated over all clients and prospects, so that it can be rescored monthly on all advisors.

Predictive Scoring For Sales Growth and Redemption Control

Mine your transactional and activity data to predict which advisors will buy, what they will buy and when. Use these insights to align your inside and field sales coverage to those advisors who are best positioned for growth based on data analysis of their past behaviors. Arm your sales team with intelligence they can use to supplement their own client and territory knowledge. Spot the redeemers early, and analyze the impact of your marketing and sales activities on stemming the flow of or accelerating their redemption behaviors. This allows you to cover more advisors within the same territory by targeting advisors when they are most likely to be receptive.

Advisor Acquisition and Prospecting

Understand the profiles and personas of your own best financial advisors and apply these insights to your prospecting data to determine which advisors your new acquisition efforts should be focusing on. Prospective advisors are often derived from third party sources such as Discovery and Meridian-IQ.

New Advisor Onboarding

Understand the value drivers of long term positive outcomes for newly-acquired advisors including initial funds purchased, firms, and marketing-generated activities associated with on-boarding such as newsletters, web activity and sales coverage. Create an action path of optimized sales coverage strategies to accelerate growth in sales by those advisors most likely to maintain and build their relationships with your organization.

Marketing & Sales Reporting and Analysis

Reporting and Measurement

FundGUARD not only integrates and tracks your data to provide depth and breadth of analytics and insight but also provides an on-demand system for comprehensive reporting and measurement of results. By accessing the secure FundGUARD portal, marketing and sales professionals can access real-time feedback on the actual results of their marketing and sales activities.

Executive and Marketing Dashboards

See the big picture with in-depth performance and ROI reporting. Direct access to transactional and activity data detailed reporting is provided on all aspects of sales and marketing initiatives and then pushed to easy to read dashboards. Taking the solution to the next level is the application of predictive analytics against this data to calculate “what if” scenarios that allow executives to quickly identify and take action on the most effective initiatives to achieve company goals.

Sales Management and Territory Analytics

Allow your team to manage their sales effectiveness by giving them detailed reporting and comparisons on territory performance, as well as explicit suggestions on how to improve. For example, if territory A5 changes their call pattern by 5%, using the FundGUARD Purchaser Module they will see a 20% improvement in revenue. Additional reports provide insights into historical assets and sales, coverage, advisor lists, lift and ROI.

Cloud Computing Backbone

Analytic Data Mart

FundGUARD provides an on-demand hosted analytical data mart specifically designed for the predictive analysis, reporting and measurement needs of mutual funds and wealth management organizations.

Data Integration and Management

FundGUARD imports, hosts and integrates data from multiple client and external sources to provide a unified data environment from:

- Transactional data sources (internal systems, Broadridge, FundSERV)
- Industry advisor databases (Discovery, Coates)
- Statistics (SAS, SPSS)
- CRM sales activity data (Salesforce.com, Oracle Siebel, SalesLogix, SalesPage)

Integration with Sales Force Automation and CRM Platforms

FundGUARD integrates with the Salesforce.com CRM platform, as well as other common CRM platforms and tools including Siebel Systems, Microsoft Dynamics, SalesLogix, SalesPage, Act!, Microsoft Outlook, and other popular sales force automation and contact management tools.

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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