

FundGUARD™

KnowledgeCLOUD™ for Asset Management



FundGUARD delivers predictive analytics in the Cloud to increase assets under management while reducing redemption risk for mutual fund distributors.

KnowledgeCLOUD for asset management solutions are delivered via KnowledgeHUB™, an integrated analytical platform that unifies disparate data sources and produces predictive outcomes— with mutual fund distribution specific modules and expertise. Finely tuned client engagement services ensure effective change management and program adoption throughout your organization.

Clients experience rapid time to value with reduced IT investment, and enjoy the benefits of industry leading analytics—without the need for highly specialized human capital.

KnowledgeCLOUD for asset management offers a diverse set of advanced analytics modules for marketing and sales effectiveness in the mutual fund and wealth management industry:

Marketing Modules

Advisor Segmentation

Analyze historical data to define your customer segments according to their current purchases, costs to serve, future value, wallet share, monthly transactional and activity data, web behavior, campaign response and tenure.

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— to modify behavior and increase customer lifetime value.

Cross-Sell / Next Logical Fund

Identify products or services that complement ones a particular customer has purchased, and recommend ones based on product uptake at similar customer accounts.

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.

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 focused on.

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Sales Modules

Most Likely to Purchase

Most Likely to Redeem

New Advisor On-Boarding

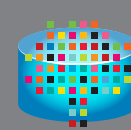
Channel Analytics

Fund Acquisition

KnowledgeHUB™ Platform



Rapid Deployment Processes



Integrated Analytical Platform

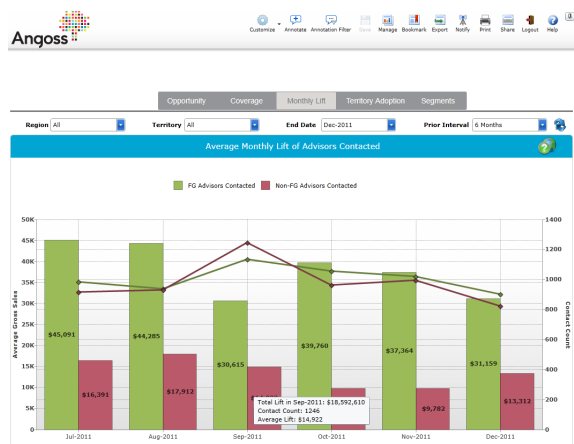


Client Engagement Services

Sales Modules

Most Likely to Purchase

Mine your transactional and sales activity data to predict which advisors will buy, what they will buy and when they will buy. Align sales coverage to those advisors who are best positioned for growth to improve sales productivity.



Average Monthly Lift of FundGUARD Leads

Most Likely to Redeem

Spot the redeemers early and analyze the impact of your marketing and sales activities on stemming the flow of or accelerating redemption behaviors.

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.

Channel Analytics

Study the interplay between channel and asset stickiness to gain insights such as which channels can be leveraged most effectively for new business and which marketing strategies are most effective.

Fund Acquisition

Target advisors of newly acquired companies to transfer fund holdings by providing them similar or same funds offered by your company.

KnowledgeHUB Cloud Platform

The KnowledgeHUB platform is a fully integrated, cloud-based analytical platform together with supporting deployment processes and professional services that deliver next generation predictive analytics to clients in a hosted environment.

Data from multiple sources is centralized in an analytic data mart, scored and sent to the front-lines of your organization for action. Detailed management reporting is provided, ensuring full program transparency and ROI accountability. A closed-loop system ensures that analytical modules continue to improve over time based on the latest data and results.

Patented Angoss predictive analytics technology is utilized for the development of models and the deployment of solutions. This technology is supplemented with extensive analytical expertise, providing customers with thought leadership and shared best practices in designing and implementing effective solutions.

The KnowledgeHUB platform enables decisive action required in today's fast-paced world, enabling you to out-manoeuvre your competition.

Corporate Headquarters

111 George Street, Suite 200
Toronto, Ontario M5A 2N4
Canada
Tel: 416-593-1122
Fax: 416-593-5077

European Headquarters

Surrey Technology Centre
40 Occam Road
The Surrey Research Park
Guildford, Surrey GU2 7YG
Tel: +44 (0) 1483-452-303
Fax: +44 (0) 1483-453-303