

In the financial industry, customers are looking for both an optimal asset portfolio and a pleasing customer experience, and I can help you achieve both.

My continuous observations and streaming analytics immediately pinpoint risks while alerting you to opportunities to avoid loss and maximize your profits, whether it's engaging prospective customers or optimizing portfolios. You can even adjust my suggested strategies, I give you instant, quantified feedback.

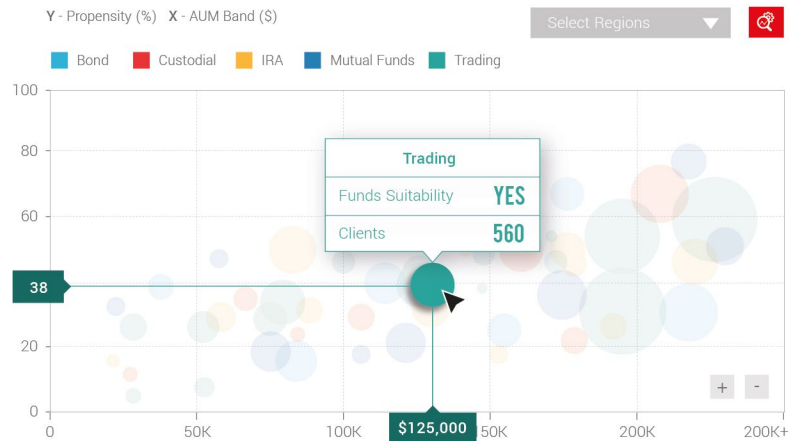
My artificial intelligence is always learning, so it adapts to you and the way you like to work. When you've chosen your optimal strategy, I help you carry it through to completion. Let me show you how to make the most of your business's hidden opportunities.

Which clients with total IRA accounts over \$75 K should be offered managed funds?

2,967 clients are eligible and suitable for Managed Funds.



Context: Propensity to Purchase



Maximum Buy Propensity: Bond (AUM \$75K - \$100K) | Minimum Buy Propensity: Bond (AUM \$200K+)

Here are the latest opportunities I've sensed

Potential Cross-Sell Opportunity #22 IRA Account Holders

Offer Managed Funds to IRA Clients	Expected Start: 06/01/2017	Opportunity Size: \$151K	Base Coverage: 27%	Current Sales Rate: 16%	Impact: 88%
	Expected Closure: 07/01/2017				

Potential Cross-Sell Opportunity #22 IRA Account Holders

Revenue Impact: \$151K
Expected Uplift: 12.3% (+5.8%)

HNW Expected Share: 76%
MNW Expected Share: 16%
LNW Expected Share: 8%

1. Recommended Strategy: Mailer (+10 Days), Outbound Call (+/- 3 Days), Follow-up...
2. Current Progress: Mailers 765 / 2967

Revenue Uplift: 12.3%

Potential Upsell Opportunity #22 IRA Account Holders

Cross/Up Sell diwo's recommendation

Single Account Holder | Multi-Account Holder | GDP Growth | Property Rates | Low | High | HNW

Client Segment: HNW
Revenue Contribution: 35%
New Revenue Estimated: \$9.2K
>2 Account per Contract: 58%

Potential Impact	
Revenue Impact	\$151K
Potential Cannibalization	\$16K
Net Revenue Recovery	12.3% \$135K

Recommendation

1. Target Reach-out Strategy: Target Reach-out..., Outbound Call (+/- ...), Follow-up Mail...
2. Current Progress: Mailers (765 / 2967)



Assuming average conversion of new clients to Money Market promotion, this offering will generate \$2,120,130 in new revenue for Quarter 1.

Related Questions

What should my second offer be for new IRA customers?

Which Managed Funds should I offer to clients with total IRA account balances less than \$75,000?