



# How Much of Your Wealth Management Business is Ignored?

**With 80% of your advisors' time spent on 20% of their book of business, how much of your business goes untouched? Unlock the revenue potential of your entire client base with predictive analytics.**

Given the right information and the right client analytics, advisors can drive relationships more deeply and broadly, building profitability with your most receptive clients and discovering the revenue opportunity of untouched clients. By using appropriate client intelligence and analytics solutions, wealth management firms can migrate to a more dynamic approach to client management.

As firms augment traditional Assets under Management (AUM) methods for client segmentation with more sophisticated methods, they are better able to anticipate and meet client needs and increase client acquisition, satisfaction, and retention.



### Dynamic, effective practice management

Effective practice management requires that you answer key questions:

- How can I allocate more time to clients with unmet needs?
- How can I identify the best cross-selling opportunities?
- Which clients are showing signs of attrition risk?

By monitoring and analyzing client profiles and behavior patterns, such as asset allocation and funds-flow patterns, or transaction and communication frequencies, your firm can tailor practice models and advisor approaches to be most effective.

Capgemini has extensive experience helping financial firms define and operationalize growth strategies. We can help equip your advisors with the right tools to increase individual performance and productivity. With more effective practice management, your firm can drive top line performance.

### The right technology drives the right client service model

Creating an effective client service model requires a detailed and flexible understanding of your clients' evolving needs. Sophisticated data gathering and analysis are the primary advisor tools for increasing overall performance. To meet these requirements, Capgemini has partnered with advanced analytics provider Success Metrics.

### Success Metrics: Analytics for client-focused financial firms

Success Metrics is an easy-to-use solution that gives advisors a holistic view of their business and individual clients, the details necessary for effectively managing client relationships, and the predictive capabilities that identify potential growth opportunities.

Available as an on-demand service, Success Metrics can be quickly deployed—typically within 90 days. With its unique combination of advanced technology and rapid deployment, Success Metrics

**Figure 1. The advisor homepage provides an overview of an advisor's business, performance, and opportunities**



applications can help you uncover real results in a very short amount of time.

**A single, detailed view of an advisor's business and clients**

With a comprehensive view of each advisor's book of business, your advisors can quickly understand both their overall practice as well as each individual client. Personal, transactional, and financial information is immediately available for review or consultation (see Figure 1).

**Clear identification of opportunities**

Using advanced analytics, target opportunity areas are highlighted for each client, so that advisors can offer the right advice at the right time and take the greatest advantage of cross-selling opportunities.

**Client-specific recommendations**

By evaluating each client against clients in similar situations, our applications can help your advisors make intelligent recommendations on where growth opportunities lie (see Figure 2). The easy-to-use interface makes it simple to identify the best recommendations—the more stars, the greater the opportunity.

**A powerful, client-focused solution that is easy for advisors to use**

Traditional enterprise analytics solutions have garnered a well-deserved reputation for being expensive, difficult, and time consuming to deploy and use. Together, Capgemini and Success Metrics combine the power of a leading technology solution and the financial services domain expertise of a top tier consulting firm to help you meet the needs of your advisors throughout the organization, quickly and effectively.

**Deployed within 90 days**

Implementation for our solution is fast and easy since it's delivered over the web. Most companies can start seeing value in just 90 days, even with customized implementations.

**Accessible from anywhere**

Our solution is available wherever there is an Internet connection. Analyses can be exported as a Microsoft Excel worksheet or Adobe PDF document so users can have valuable information available even when disconnected.

**Figure 2. A client's development opportunities are highlighted with stars**



### How we work together

Our integrated Capgemini delivery team rapidly tailors Success Metrics' analytics and reporting to your firm's key client segments and product and service mix. We can prepare data to be imported and integrated into the Success Metrics application and fully manage application deployment, training, and rollout to your advisor network.

Together with Success Metrics, Capgemini offers the most practical and effective approach for serving wealth management clients.

For more information contact us at [wealth@capgemini.com](mailto:wealth@capgemini.com) or [sales@successmetricsinc.com](mailto:sales@successmetricsinc.com) or learn at [www.capgemini.com/wealth](http://www.capgemini.com/wealth) or [www.successmetricsinc.com](http://www.successmetricsinc.com)



### About Capgemini and the Collaborative Business Experience

Capgemini, one of the world's foremost providers of Consulting, Technology and Outsourcing services, has a unique way of working with its clients, called the Collaborative Business Experience.

Backed by over three decades of industry and service experience, the Collaborative Business Experience is designed to help our clients achieve better, faster, more sustainable results through seamless access to our network of world-leading technology partners and

collaboration-focused methods and tools. Through commitment to mutual success and the achievement of tangible value, we help businesses implement growth strategies, leverage technology, and thrive through the power of collaboration.

Capgemini employs approximately 83,000 people worldwide and reported 2007 global revenues of 8.7 billion euros.

More information about our services, offices and research is available at [www.capgemini.com](http://www.capgemini.com).

### About Success Metrics

Success Metrics provides advanced analytics solutions to enterprise companies, delivered on-demand. Based on its cutting-edge analytics platform and innovative on-demand business model, Success Metrics can deliver a custom analytics solution within 90 days, at a fraction of the cost of traditional solutions. As a result, Success Metrics enjoys client relationships with some of the largest financial services providers in the US. One large client is driving over \$300 million a month in asset inflows due to its Success Metrics implementation. Visit us at [www.successmetricsinc.com](http://www.successmetricsinc.com).