

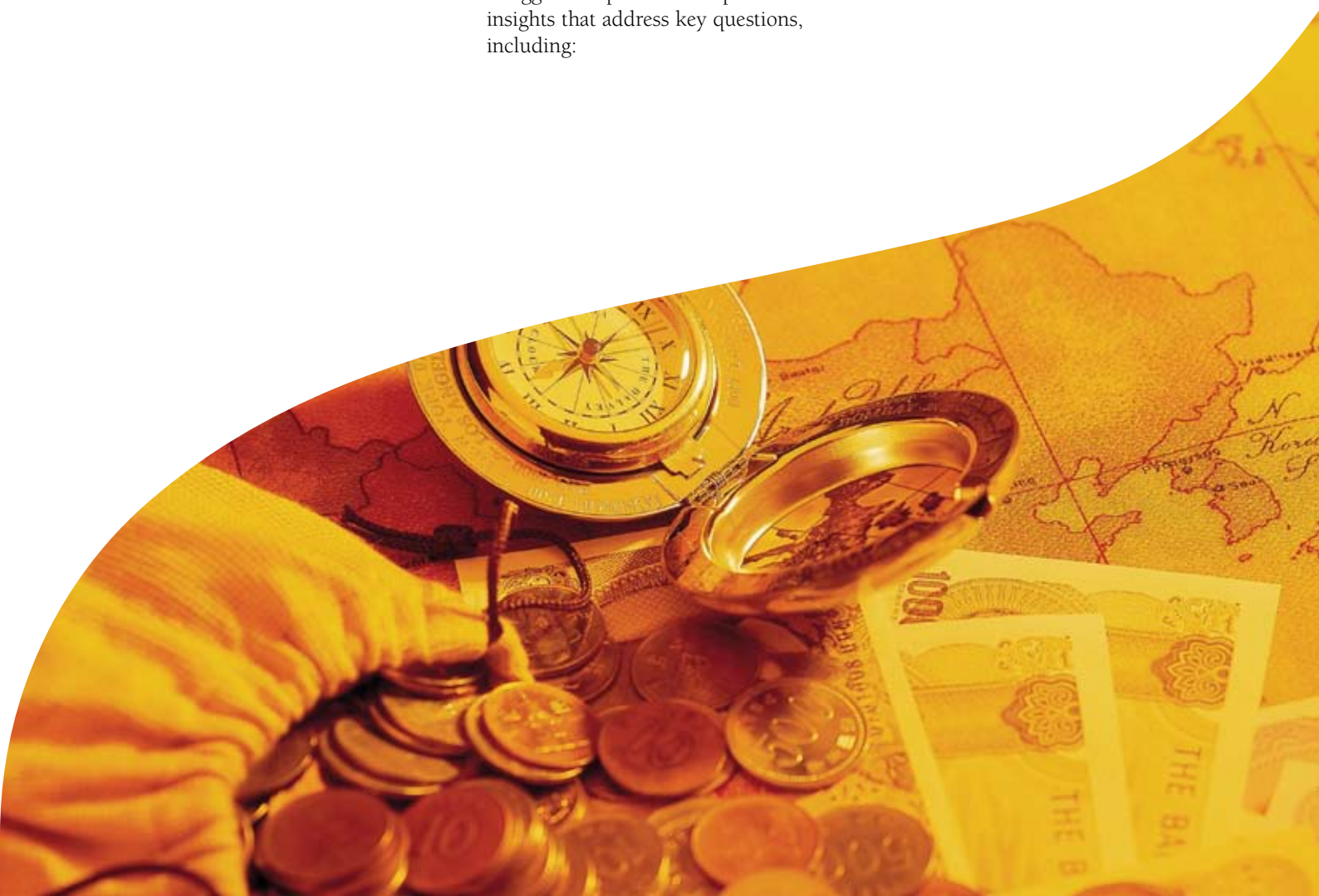


# Do you have the necessary insight to power your sales growth strategy?

**Using predictive analytics, financial services firms can identify and pursue hidden opportunities to drive sustainable top line growth.**

Practice management. Coaching. Development tools. Many financial firms are investing in these types of programs to drive growth but programs often lack appropriate analytics and reporting to measure results and sustain change. Executives struggle to capture marketplace insights that address key questions, including:

- Are we on track to meet growth objectives?
- How do we replicate successful approaches?



- How can we identify high potential advisors?
- How do we know when clients or advisors are at risk?

Leading wealth management firms are addressing these challenges by leveraging sales, advisor and customer analytics to proactively identify business drivers and risks and to deliver value-added sales management and practice management coaching advice.

To empower a top-line growth strategy, Capgemini can provide your executives and managers a comprehensive view of your business and its opportunities. Equipped with predictive customer analytics, advisors can drive relationships more deeply and broadly, increasing profitability by pursuing the greatest opportunities and discovering the revenue potential of untouched customers. Capgemini can enable management by identifying and continually measuring the right leading indicators, delivering the right information tailored to your firm's sales and practice management

operations and strategic growth priorities.

**The right technology, strategically placed, drives corporate performance**

The key to driving performance is your ability to understand your organization and customers. The right approach is powered by sophisticated data gathering and analysis and requires the right technology solution to turn your data into insights. Capgemini has partnered with Success Metrics as the technology provider most capable of meeting the needs of forward-looking financial services firms.

**Success Metrics: Advanced analytics for financial firms**

Success Metrics is an easy-to-use solution that provides value across your financial services firm. From executives in the home office who require key metrics and business drivers, to advisors in the field who want a holistic view of their business and a detailed view of individual clients, Success Metrics



**Figure 1. The Home Office view shows key corporate metrics and regional performance**



provides the right information to power business decisions, including analytics for identifying client growth opportunities.

Available as an on-demand service, Success Metrics can be quickly deployed—typically within 90 days. With the unique combination of advanced technology and rapid deployment, Success Metrics applications can help you uncover real results quickly.

**Track the right metrics to grow sales performance**

Executives require both high level and appropriately detailed information. Our solution provides insight to support informed decision making by providing visibility into critical business issues.

*Establish and monitor key metrics.*

Quickly and easily understand where your business stands today. Comprehensive and detailed views of asset inflows, production breakouts, and various performance metrics are all available in one place. See Figure 1.

*Identify corporate and client sales growth areas.* At the branch, advisor and client levels, get a complete, detailed view of product performance and recommendations for revenue growth; opportunities can also be shown by client segment.

*Identify practice management and coaching opportunities.* Know which practice management initiatives are creating real results. Identify which advisors would benefit from additional coaching and which are departure risks.

**Position practice management to share best practices**

With the right access to information, it's easier to set, monitor and achieve practice management and customer-focused goals.

*Benchmark advisor performance to replicate successes.*

Comprehensive performance, client and advisor information show regional and branch managers who are high-performers and how the average advisor can better capture customer and business opportunities. See Figure 2.

**Figure 2. The regional view provides a closeup of performance and development opportunities for a single region**



**Help advisors plan tailored outreach to high-value customers.** Customer growth opportunities are easily identified so your advisors can initiate critical conversations that improve customer portfolio performance and customer satisfaction.

**Get wealth management best practices and client-focused analytics—within 90 days**

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

Companies seeking to improve advisor productivity, deepen client relationships, and maximize top-line growth while reducing deployment risk can find these benefits and more, with results in as fast as 90 days.

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

Learn more about our solutions for wealth management firms 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 customer relationships with some of the largest financial services providers in the US. One large customer 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).