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CFO, ABC Company

$500k -$1MM *Net Worth*

86 Customer

WEALTH

PERSONAL

360 VIEW ACTIONLYTICS

Data Analytics for Better Results

A CRM on its own can provide valuable insights into a customer's relationship with your financial institution. As many struggle with understanding the true value of each relationship, a CRM consolidates account information with householding, providing a complete view of all products and services owned. Now imagine taking your CRM to the next level, putting you in the position to better target customers and prospects for the right offers based on true intelligence. If you're ready to add value to your marketing programs, then Actionlytics is what you're looking for.

Actionlytics is 360 View's own analytical intelligence. It means having access to informative data that helps you understand valuable demographic and wealth data—putting you in the position to create models and segmentation programs for both customer retention and growth opportunities.

WEALTH INTELLIGENCE

You can access consumer demographic and wealth data powered by WealthEngine™, right from the 360 View Growth Platform. This wealth intelligence includes customer information such as: net worth, investable assets, real estate value, marital status, and more. With over 35 fields available, you have data that puts you in a better position to target customers for the right product offerings. Update your full consumer database with appended demographics and wealth data annually, while new customers are appended daily so you can create meaningful onboarding programs from the get-go.

Having wealth intelligence within 360 View, enables you to:

- Segment customers according to wealth and demographic factors

- Gather more research on prospective customers

- Increase efficiencies by targeting customers with products and services relevant to their lifestyles, and eliminating those who are not likely to buy

RIGHT ACTION? RIGHT TIME

Ultimately, Actionlytics makes data within the 360 View Growth Platform actionable, meaning banks and credit unions can use the insights and analytics derived from the tool to take the right actions for their business at the right time. Because Actionlytics is fully integrated with the platform, it can be used with the following modules:

CRM
Adds demographic and wealth intelligence to existing customer and prospect records

MARKETING AUTOMATION

- Allows for more strategic and intelligent marketing campaigns based on better segmentation
- Drives up-sell and cross-sell campaigns, ensuring the right customers are targeted with the right opportunities
- Enhances SmartPops™ prompts for more focused customer-specific messages
- Allows for more targeted new customer onboarding programs

DEMOGRAPHIC AND WEALTH DATA APPEND FIELDS

Your Personal Customer, Prospect, and Unknown contacts will be appended with the fields below when available.

- Accredited Investor
- Address(es)
- Age
- Board Member Flag
- Boat & Aircraft Owner Flag
- Business/Organization Type
- Business Address
- Business Email
- Business Ownership Flag
- Business Phone
- Business Sales Volume
- Business Title
- Business/Organization Name

- Cash On Hand
- Children Flag
- Donations Charitable
- Donations Political
- Est. Annual Donations
- Gender
- Gift Capacity
- Inclination Affiliation
- Influence
- Investible Assets
- Married Flag
- Name
- Net Worth

- Number of Properties
- P2G
- Pension
- Personal Email
- Personal Phone
- Planned Giving
- Real Estate Value
- Spouse Name
- Stock Direct Holdings
- Stock Indirect Holdings
- Stock Total Value
- Total Assets
- Total Income

Wealth and demographic data is provided by WealthEngine™.
To find out more about WealthEngine™ visit wealthengine.com.