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FSConnect
For AssetApp

AssetApp is a Force.com-based accelerator that helps drive better Distribution Platform strategy and execution. It integrates the multi-channel application, data architecture and reporting and analytic components that our Asset Management clients require to compete in the market. The application is a pre-configured solution that incorporates best practices and insights from 7+ actual client implementations, and is designed to meet the needs of sales, distribution, and service business functions for both institutional and retail asset managers.

FEATURES

Pre-defined personas and journeys
Fully crafted investment management specific personas and journeys ensures a Human Centered Design approach. Key "Moments that Matter" guarantee focus on highest value areas of enablement.

Capability maps and sizing
Investment Management specific capability map outlining key functional requirements at epic level, which is continuously updated to incorporate recent work. Effort sizing catalogue aligned to the capability map to provide effort and assumptions based on delivery experience.

Embedded Collaboration capability
Has Embedded Collaboration capability that makes it easier to collaborate on closing deals and retaining AUM across marketing, sales, consultant relations and portfolio managers.

Business Development Capabilities
Features tailored to sales executives in the investment management industry who want to intentionally target new mandates and in-flows using targeted action plans and historical identification of client needs gleaned during client interactions.

360 Degree Client & Prospect View
Provides the holistic footprint of a company or firm, including opportunities, key contacts, activities, pools of capital, and financial accounts.

Consultant Relations Heatmap
A visualized heat map of consultant ratings that allows firms to quickly understand how different products are rated by consultants, and allows sales executives to quickly execute when favorable ratings are rendered

BENEFITS

Better insight into customer interactions and experiences to date enabled by centralized data

360 view of contacts, including 'who knows who' relationship management, and visibility into recent conversations to drive meaningful communication

Snapshots of performance by region, product, or industry help quickly identify white space to drive new opportunities

Reduces the number of disconnected systems and data sources that employees and customers interact with driving a seamless experience

CONTACT

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