

Identifying the best-performing advisors Determining the right factors that drive success

Key Benefits & Features



- Implement focus groups, including training workshops and corrective actions, and improve the performance of its non-performing advisors— establishing best practices that the entire global advisory team can follow.
- Insights were presented as easy-to-understand charts and if-then rules that business users can understand. The insights ridded the clients weaknesses by helping to predict the probable performance of its advisors

Intuceo Managed Analytics Solutions for Financial Advisory

- Advisor performance was measured, tracked, and guided. After uploading all of the historical transaction data of the client's approximately 6,000 advisors
- Classified and benchmarked advisors by their performance
- HiddenInsights™ engine generated several hundred actionable insights by which the client can now effectively evaluate its advisors.
- Data was factored by demographic and transactional factors for advisors and investors
 - created several time-based attributes, including cash deposit amount in the previous month, quarter, and year

The  **Predictive Analytics Platform** utilizes open source big data technologies with accelerators for Data Engineering, Predictive Analytics, and Visualization solutions to solve complex Business Challenges



DataFuse



DataSharp®



HiddenInsights™



BoldVistas™



InsightExplorer™