



# Distribution Intelligence. **Smart at Scale.**

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Real World Examples: Pushing eVestment  
Competitive Intelligence to Salesforce

## REAL WORLD EXAMPLES:

eVestment intelligence pushed to Salesforce and integrated with your existing investor data

This sample integration consolidates data from eVestment with existing data in your Salesforce record. The result is a total picture of each investor that combines your interaction history through the Salesforce Activity log, with fresh intelligence on contacts, allocations, mandate history and manager rosters.

*(This data display is an illustration; your actual data display will be specific to your Salesforce configuration.)*



Account  
Investor

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Account Name  
Boston Retirement

Account Owner  
Stewart Franks

Firm Type  
Public Fund

Total Assets  
USD \$5 B

Website  
https://www.boston.gov/departments/retirement

Asset Class	Asset Class Detail	Est. Allocation	Target Allocation
Equity	-	50.5%	48.0%
	US Large Cap Equity	20.6%	17.0%
	US Small Cap Equity	6.9%	6.0%
	Non-US Equity	22.9%	25.0%
Fixed Income	-	27.1%	26.0%
	Core Fixed Income	17.5%	16.0%
	Value Added Fixed Income	9.6%	10.0%
Alternative Assets	-	21.9%	26.0%
Cash	-	0.5%	0.0%

Post

Opportunities

Opportunity Name	Consultant	Opportunity Owner	Status	Amount
Global Emerging Mkts All Cap Core Equity	Consultant ABCD	Judy Jones	Announced 25%	USD \$115 M
US Core Fixed Income	Consultant ABCD	Mil Shah	Announced 25%	USD \$950 M
International Equity	Consultant ABCD	unassigned	Potential 5%	-

Manager Roster

Manager	Product/Fund	Est. Market Value
WF Manager	USCoreFixedIncome	\$300.9 M
GreyStone	Global Unconstrained Fixed Income	\$305 M
Grover Capital	All Fund of Funds	\$111.5 M

Contacts

Contact Name	Title	Email	Phone	LinkedIn Profile
1 Chris Waters	Operations Officer	<a href="mailto:Chrisw@bostonretirement.com">Chrisw@bostonretirement.com</a>	000-867-5309	<a href="https://linkedin/cwaters">https://linkedin/cwaters</a>
2 Hellen McSweeney	Chief Financial Officer	<a href="mailto:Hellen@bostonretirement.com">Hellen@bostonretirement.com</a>	101-867-5309	<a href="https://linkedin/hmcsweeny">https://linkedin/hmcsweeny</a>

## REAL WORLD EXAMPLES:

eVestment intelligence pushed to Salesforce and integrated with your existing consultant data

This sample integration consolidates data from eVestment with existing data in your Salesforce record. The result is a total picture of each consultant that combines your interaction history through the Salesforce Activity log, with fresh intelligence on key professionals, client rosters, manager ratings, and mandates. *(This data display is an illustration; your actual data display will be specific to your Salesforce configuration.)*

<div> <div>Account Consultant</div> <div> <div>Account Name</div> <div>Consultant ABCD</div> </div> </div>	<div> <div>Account Owner</div> <div>John Smith</div> </div>	<div> <div>Firm Type</div> <div>Consultant</div> </div>	<div> <div>Assets Under Advisement</div> <div>USD \$1 T</div> </div>	<div> <div>Website</div> <div>http://www.consultantabc.com/</div> </div>	
<div> <div>Assets Under Advisement</div> <div> <div>Clients</div> <div>Details</div> </div> </div>	<div> <div>Post</div> <div> <div>Share an update...</div> <div>Share</div> </div> </div>				
<div>Total AUA</div> <div>USD \$1 T</div>	<div>E&amp;F AUA</div> <div>USD \$74 B</div>				
<div>Public AUA</div> <div>USD \$607 B</div>	<div>Union AUA</div> <div>USD \$44 B</div>				
<div>Corporate AUA</div> <div>USD \$221 B</div>	<div>Other AUA</div> <div>USD \$98 B</div>				
<div> <div> <div>▼</div> <div>Ratings</div> </div> </div>					
Date	Investor	Manager	Product/Fund	Asset Class	Rating/Recommendation
5/17/2021	University of Maine	L, C & Co Manager	<a href="#">https://ev.com/LoanFundProduct</a>	Fixed Income	Hire
5/17/2021	University of Maine	ABCDE Manager	<a href="#">https://ev.com/AllAssetStrategy</a>	Balanced/Multi-Asset	Watchlist
4/20/2021	Baltimore City Fire & Police	Macdougall Investment	<a href="#">https://Emerging Small Cap Equity</a>	Equity	Shortlist
4/20/2021	Baltimore City Fire & Police	Grover Capital	<a href="#">https://GCAdvFund, LP</a>	Private Equity	Hire
3/24/2021	Boston Retirement System	Grover Capital	<a href="#">https://GCAdvFund</a>	Private Equity	Recommend
<div> <div> <div>▼</div> <div>Contacts</div> </div> </div>					
Contact Name	Title	Email	Phone	LinkedIn Profile	
1 Arthur Song	Senior Consultant	<a href="#">arthurs@consultantabc.com</a>	000-867-5309	<a href="#">https://linkedin/asong</a>	
2 Chris Myers	Sr. Research Consultant	<a href="#">chrism@consultantabcd.com</a>	101-867-5309	<a href="#">https://linkedin/cmymers</a>	
3 Erin Falcon	Principal, Dir. Research Ops	<a href="#">erinf@consultantabcd.com</a>	202-867-5309	<a href="#">https://linkedin/efalcon</a>	
4 Brad	Schmidt	<a href="#">brads@consultantabcd.com</a>	303-867-5309	<a href="#">https://linkedin/brads</a>	

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Account Name	Account Owner				
1199 SEIU	Betsy L.				
Alcoa	John H.				
Baltimore City Fire & Police	Bruce B.				
Boston Retirement	Stewart F.				
Fresno City Retirement	Bruce B.				
University of Maine	John H.				
<div> <div> <div>▼</div> <div>Ratings</div> </div> </div>					
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3 Erin Falcon	Principal, Dir. Research Ops	<a href="#">erinf@consultantabcd.com</a>	202-867-5309	<a href="#">https://linkedin/efalcon</a>	
4 Brad Schmidt	Research Consultant	<a href="#">brads@consultantabcd.com</a>	303-867-5309	<a href="#">https://linkedin/brads</a>	



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Pushing data from eVestment to Salesforce with an API puts critical competitive intelligence in your team's every day workspace, where they can see it and act on it.

**Learn how firms just like yours are getting smart at scale with the Distribution Intelligence API.**

**[solutions@evestment.com](mailto:solutions@evestment.com)**