EVESTMENT
A Part of Nasdaq

CASE STUDY

Global asset manager leverages advanced data analytics, powered by APIs, to engage new investors.

$1T
FIRM AUM

Integrating multiple sources of investor intelligence has been key.

With a global client base and world-class brand, this top manager sees opportunities to serve even more investors by engaging on the right topics and investment solutions at the right time.

Insights at scale

Like most asset managers, this firm had multiple sources of data on investors, housed in separate platforms. Its six-person team of analysts in Institutional Product Strategy were power users of the various platforms and experts at stitching together signal-rich data. The challenge was keeping up with requests for insights from 100+ Relationship Managers.

"We knew that training Relationship Managers to self-serve just wasn't a feasible option. Our team's expertise in 'connecting the dots' among multiple data sources, then picking-up on meaningful signals doesn't easily translate to a training program. Also, of course, we want Relationship Managers out engaging with investors, not struggling with data extraction. It was clear to us that only a technology-forward approach could scale our team's expertise."

Actionable intelligence

The team's vision was ambitious: It wanted to automatically push intelligence to Relationship Managers in the field to help them connect with the right investors at the right time about the right topics and solutions. Because some Relationship Managers cover 50 or more accounts, using data to prioritize the right prospects would be a leap in efficiency as well. They envisioned Relationship Managers logging into their CRM dashboard each morning and seeing real-time alerts on which investors to engage.

Push alerts in the CRM

"With the consolidated view of investors we've created by integrating eVestment data into our CRM, we understand who investors work with, which may be seeing underperformance, and which are under-weight in areas where we have a strong offering. By leveraging APIs, we're able to triangulate this data and pinpoint opportunities for engagement, then automatically alert Relationship Managers right in the workspace they use every day -- our CRM."

Phased implementation

With a clear vision based on an understanding of the power of eVestment data, the team worked with our API engineers on a phased approach to implementation.

Rather than attempting to pull down all data on the almost 20,000 investors covered by eVestment, the team decided to start smart, focusing on high-value investors and perfecting their rules-based alerts, determining, for instance, how to define "underperformance" in different universes. This measured approach ensured that Relationship Managers received signal-rich alerts from the beginning, with minimal noise.

"Looking ahead, our next phase will be expanding the alerts library and covering additional tranches of investors. Our Relationship Managers are eager to get more alerts; at the same time, though, we're intent on keeping the action-oriented edge so what gets surfaced gets acted on."