

Client teams take care of the largest clients. Sales teams go after clients with the largest wealth potential.

Client Wealth Evaluation

monograph

offering

winter 2011

► **STRATEGY**

Multiple algorithms assign a specific score to each client. These final scores are consolidated using another algorithm to create an “opportunity score.”

► **STRATEGY**

All proprietary information is blinded. Names, street addresses, etc., are not required to successfully run the algorithms.

► **STRATEGY**

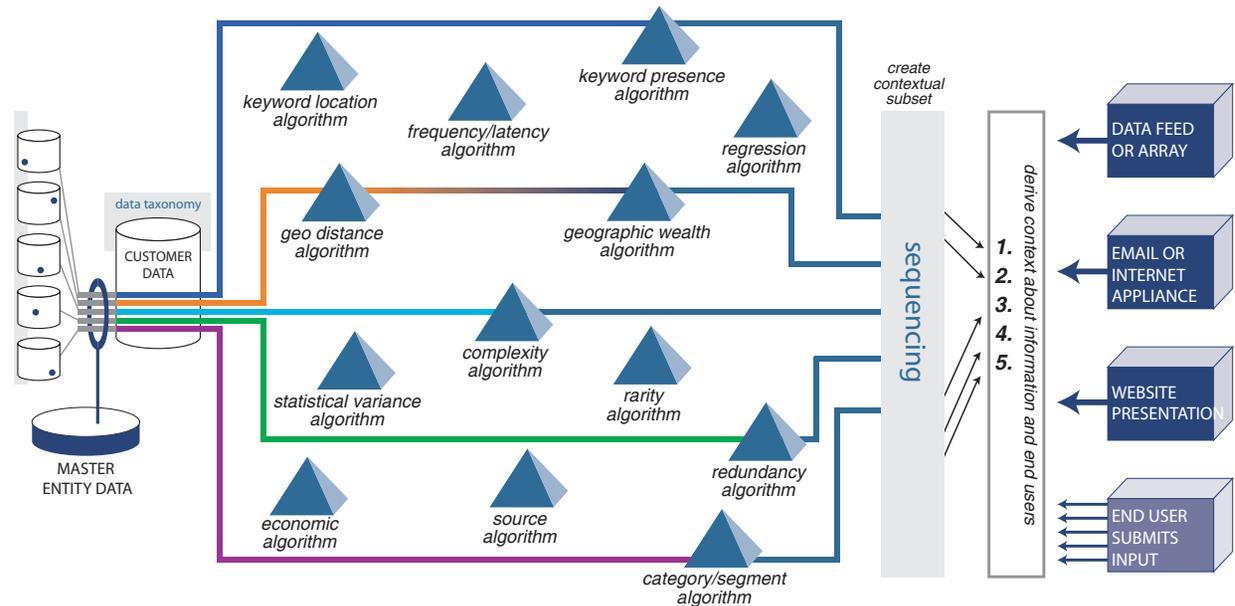
Infornaotics believes there are at least 20 factors that create a strong correlation to the spending capacity of existing clients and these vary by industry and type of service offering.

With the right tools, firms can increase sales to existing clients by more than 100%. The key is to focus a fixed sales force investment in the right direction — existing clients with high spending capacity.

Client relationship management (CRM) prides itself on “no surprises”. It manages accounts for maximum client satisfaction and annuity investment. What it fails to do is evaluate a client’s wealth potential and assess the revenue opportunities for your company.

Let’s look at an example. Imagine you own an investment firm with over one million clients. It takes less than 30 seconds to rank each client based on size of spending with your firm. A sound business strategy would be to proactively manage the top quartile. But how would you find Donald Bren if he was only investing \$100,000 with your firm?

At Infornaotics, we can help you identify Mr. Bren and learn more about him. In fact, we can sequence every client by wealth potential



in under 30 seconds. Within the first year, Infornaotics forecasts double-digit revenue growth for our clients who adopt our approach.

Sounds unbelievable? Take a look at a client’s residential zip code. Would a client living in 90210 have a greater wealth potential

than 90222? A weighting can be assigned to every zip code in the country while another can analyze current clients in those same zip codes – all within 30 seconds and the system automatically updates itself.



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