

Teradata Accelerate for Retail Brokerage: Portfolio Advisor

Target Events to Pinpoint More Powerful Client Interaction

Keeping pace with the activities of hundreds of accounts, both large and small, can be an overwhelming challenge for any retail broker or financial advisor. And as markets and portfolios become ever more diverse and volatile, it's become more difficult than ever to identify the impact of every new market event within a client's portfolio. Yet each of these events can mean a new opportunity to build revenue and customer satisfaction for both the broker and the firm.



What if you could automate the detection of events, everything from market fluctuations to changes in customer purchasing patterns? For starters, you'd be better prepared to quickly detect and address the events that can significantly impact an account/portfolio. Plus, you would be

able to offer new products or services to a specific client in a personalized way on any channel at any time – at the moment it is most relevant to each client.

That's exactly the array of advantages that Portfolio Advisor brings to you and your firm.

Never Miss an Opportunity

Portfolio Advisor lets you generate targeted, personalized communications that are triggered by events that indicate a specific and imminent client need or action. Unlike traditional marketing promotions, it lets you create proactive communications that coincide with client's needs and that are strongly tied to their inherent behavior.

Portfolio Advisor is a complete and comprehensive solution that offers retail brokerage organizations an automated event detection and lead delivery system that will alert your financial advisors to significant portfolio changes. They can then take action to increase transactions, avoid missed opportunities, and retain customers.

Teradata consultants will hold a workshop at your site to help identify and prioritize the top three events you most want to immediately implement based on your years of experience. You can choose from a wide range of proven events, such as a client with an unusually high number of

trades, high volatility in a particular stock, the sale of a business, or a significant increase or decrease in assets under management. When detected, these events will create triggers in the system to push leads to your brokers or financial advisors, arming them with the information needed to contact their client and discuss the next best option.

Increase in Assets Under Management (AUM)

Portfolio Advisor empowers brokers and financial advisors with accurate and timely data about client account activities, which you can use to increase AUM, thus increasing advisory and trading fees. The solution also provides crucial support for:

- > Gaining greater client insight
- > Driving advisor effectiveness
- > Quick, cost-effective client contact
- > Increased client satisfaction and retention

Rapid Time to Value

Teradata gives you the flexibility and rapid time-to-value solution you need to deploy sets of portfolio advisor response programs. And Portfolio Advisor includes everything you need, from the Teradata Database and platform to software and services for the quickest possible time for realizing program initiation and client feedback. With this solution, you can be pro-active with event-based responses to client activity in just 90 days.

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Fast Action for Timely Results

With Teradata you work with just one experienced vendor. That means you will not need to coordinate a wide variety of suppliers and the inherent challenges of integrating diverse systems and components. A single experienced vendor with a proven implementation methodology can avoid delays in deploying your portfolio advisor program and can swiftly address service and support issues.

An End-to-End Solution

Portfolio Advisor offers you an array of advantages, including proven methodologies and an experienced Professional Services team. It's a solution designed for optimum performance and ease of management. It's an end-to-end solution that includes:

Software

Teradata Relationship Manager allows you to build effective campaigns and dialogs, automating the delivery of personalized messages to clients or leads to advisors, through any channel and automate responses with increasing precision so success rates improve over time.

Professional Services

With nearly 30 years of experience Teradata Corporation is the undisputed leader in implementing scalable databases and integrated applications. Our patented

Proof of Performance

Teradata has been bringing the built-in benefits of event based management to companies for several years. Among the successes:

- > **An international bank** reports it achieved a **40% response rate on event driven marketing campaigns** – and as high as **75% when a customer was contacted within 24 hours of the event.**
- > **Another global financial institution** saw its initial investment **paid back in just one year**, and its customer satisfaction scores rise dramatically.
- > **A leading U.S. bank** was able to follow up on **6,000 identified leads in the first five weeks** – **40% of which generated a sale or service opportunity.**

Teradata Solutions Methodology provides best practices for a rapid and reliable implementation driving faster business results with lower risk.

Database

The most robust analytical engine available anywhere, Teradata Database 12.0 offers you a proven database that delivers high performance and high availability. It also provides effortless scalability and unmatched investment protection with a minimum of administrative overhead.

Platform

Choose from our powerful family of analytical platforms: Teradata Data Mart Appliance, Teradata Data Warehouse Appliance, or Teradata Active Enterprise Data Warehouse.

Why Teradata?

Why choose Teradata for your event-based management solution? Because Teradata Corporation, the global leader in analytic technologies, provides solutions that help make smart companies smarter. Organizations of all sizes around the world rely on the power of Teradata's award-winning solutions to get a single, integrated view of their business to enhance decision making, customer relationships, and profitability.

For More Information

To find out more about how Portfolio Advisor can help you monitor client account activities, identify opportunities for client contact, target communications and add business growth, contact your local Teradata representative or visit

Teradata.com.

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