

# USING BUSINESS INTELLIGENCE TO OPTIMIZE SALES STRATEGIES

A DST Research, Analytics, and Consulting Report Series Overview

## Primary Audience

Business Analytics Managers, Sales Managers, Heads of Distribution, Marketing & C-suite executives

## Benefits

- Exploration of what industry BI leaders are doing and what plans they have for the future
- Recommendations for firms that lag behind BI leaders to improve their competitive position, reduce costs of running the BI program, or increase BI program efficacy
- 3 steps for using business intelligence to optimize territories

## Related Research

*Uncovering Hidden Opportunities with Data-Driven Marketing Campaigns*

*Prevailing in a Changing Distribution Landscape*

## Methodology

This report series is based on previous research surveys as well as interviews with BI and Distribution executives at the industry's leading asset management firms.

Competition to sell mutual funds and ETFs to advisors is increasing. The quality of an asset manager's Business Intelligence program will be a deciding factor in who wins advisor business. As one BI executive at a leading firm put it, ***"Our competitors who can't compete with us on data, won't be able to compete at all...those firms will simply not be around 5 years from now."***

While most asset manager sales teams are guessing about who their best targets are, business intelligence leaders know which advisors will buy their products, how much they could buy, and when they're likely to buy them. Leading asset managers can better understand how advisors should be engaged to optimize sales efforts and can more accurately measure sales success and profitability.

This report series explores what separates asset managers who are leaders in BI from other firms, and makes recommendations for those falling behind to catch up and remain competitive.

## Key Findings

- Negative flows in active mutual funds and ETFs over the past 2½ years exceeded \$485B, as \$1.3T flowed into passive mutual funds and ETFs during that time period

## THREE CRITICAL ELEMENTS OF BI



Source: DST Research, Analytics, and Consulting LLC, 2016

- Asset Managers that outsource at least part of their BI program can save up to 40% of the cost of BI
- Advisors made their own investment decisions for just 36% of all AUM in 2016, down from 45% in 2013

### *About the Author*



**Jason Dauwen**  
Sr. Research Analyst

Jason Dauwen has been with DST Systems for over 16 years and joined the DST RAC team in 2016 as a research analyst. During his tenure at DST, his work has contributed to product development, customer service, product consulting, technology innovation, entrepreneurship, new business research, and corporate strategy.

Jason's reports, articles and blog posts cover a variety of topics from distribution strategies to practical and future-looking analysis of technology for distribution organizations.

### *About DST RAC*

DST RAC helps leading companies in the financial services industry manage data, gain insight, and ignite change in their business. Through effective use of advanced analytics, research, and distribution intelligence technologies, DST RAC enables business to better understand, predict, and optimize key business factors impacting their asset growth and profitability.

# *USING BUSINESS INTELLIGENCE TO OPTIMIZE SALES STRATEGIES REPORT SERIES*

**The Impact of Business Intelligence:** This paper, based on interviews with BI leaders in the asset management industry, explores the competitive differences between leading asset managers and their competitors. It explores BI leadership and strategy, BI organizational structure, and BI efficacy through outsourcing.

**Using Business Intelligence to Optimize Territories and Set Sales Goals:** This paper discusses how leading firms use business intelligence when defining sales territories and setting sales goals for those territories.

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For more information about this report and DST's research services, please contact Mariel Donnelly at 646.257.4463 or [mdonnelly@dstsystems.com](mailto:mdonnelly@dstsystems.com)

