DATASHEET

PIVOTAL® CRM FOR INSTITUTIONAL ASSET MANAGEMENT

Build "Relationship Capital" with Better Service, Collaboration, and Client Insight

Institutional asset managers need to become more customer-centric to differentiate themselves in the market and retain current clients. When institutional account contracts come up for renewal, client satisfaction plays a critical role in their decision-making. To deliver the level of service necessary to develop client loyalty, you need to align your organization to cultivate—and maintain—strong client relationships.

Pivotal® CRM for Institutional Asset Management offers the flexibility to meet the complex data requirements of diverse investment management users.

- **Improve efficiency and productivity** with automated processes and better collaboration
- **Enhance your competitive advantage** with more effective resource allocation
- **Accelerate revenue growth** through deeper, more profitable client relationships
- **Deliver superior service** with a unified view of the client
- **Get strategic insight** into client influencers and relationships
- **Leverage best practices and expertise** embedded in an industry-leading tool
- **Empower mobile personnel** with access to key information and processes wherever and whenever required

Pivotal CRM for Institutional Asset Management is designed to help employees within institutional asset management firms (IAMs) collaborate across departments to provide consistent, exceptional service to their clients—and grow assets under management. A complete customer relationship management (CRM) solution, Pivotal CRM enables IAMs to increase productivity and decrease operational costs by dramatically improving efficiency. At the heart of this solution is a toolset to help build superior client relationships that promote loyalty and increase client retention.

Pivotal CRM for Institutional Asset Management offers the rich feature set commonly used by institutional asset managers, combined with the flexibility to fit to individual firms' unique processes and environments. Pivotal CRM enables IAMs to fully integrate sales, marketing, and service functions for increased efficiency and effectiveness, providing a complete view of the client so users from all areas of the company can personalize their client interactions. Pivotal CRM saves time and increases productivity by automating and facilitating workflows for important multi-stakeholder processes such as opening new accounts and responding to RFPs. It also provides visibility into complex networks of affiliation and influence, allowing IAMs to more successfully track consultant activity and identify new opportunities.

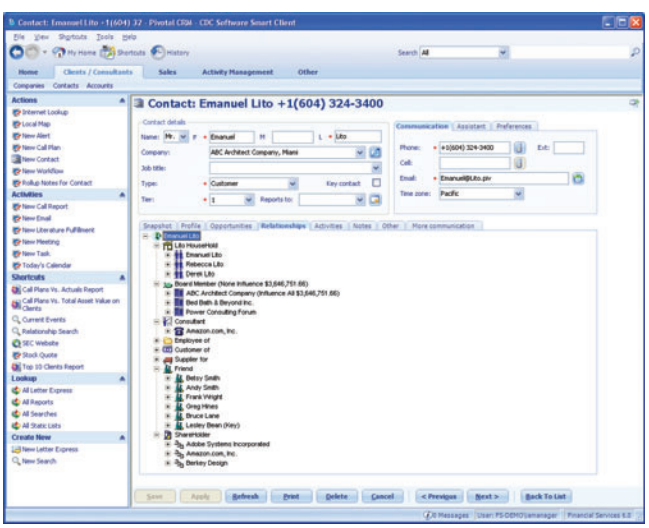
Pivotal CRM reflects a deep understanding of institutional asset managers' needs: we provide 75% of the functionality typically needed by IAMs right "out of the box." But we also understand that every business is unique: companies can take full advantage of Pivotal CRM's flexibility to complete their CRM solution with customized applications that adapt to the way their organization does business, giving them a competitive edge. This combination of industry-tailored and custom components, along with the inherent flexibility of Pivotal CRM, leads to a lower total cost of ownership.

LEVERAGE CONSOLIDATED INFORMATION TO DELIVER SUPERIOR SERVICE

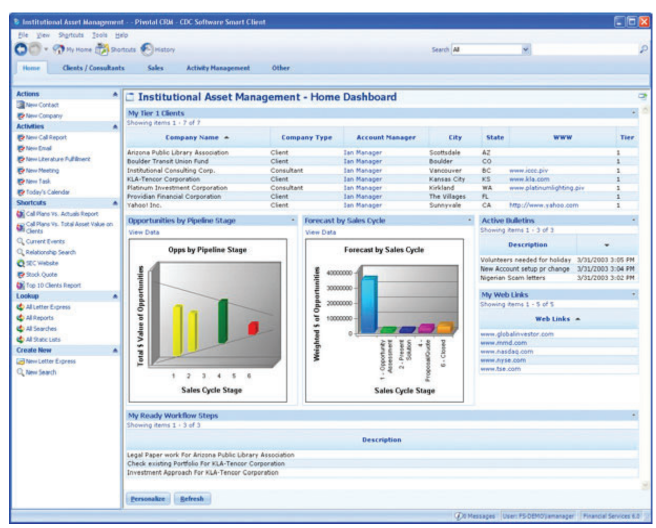
Give your users the right information at the right time, and watch their effectiveness soar. Pivotal CRM for Institutional Asset Management gives you a single, unified 360-degree view of your institutional clients. All of your users—whether they're in sales, client service, marketing, or portfolio management—get instant access to all appropriate client account information and interactions, enabling them to provide informed, personalized service that leads to increased client retention and growth in assets under management. A consolidated repository of client information establishes better communication and collaboration between departments and users, resulting in marked productivity gains. The information in your Pivotal CRM system can be supplemented with third-party information, such as money-market data and portfolio holdings, to create a rich resource you can draw upon to deliver proactive advice and create better-targeted products and proposals that are more responsive to client needs.

STREAMLINE PROCESSES AND DRAMATICALLY IMPROVE PRODUCTIVITY

Pivotal CRM for Institutional Asset Management is designed to make IAMs work easier—and smarter—by streamlining and automating processes, freeing up more time for higher-value activities. Pivotal CRM saves IAMs hours of repetitive work every day with built-in workflows that increase efficiency and reduce training costs. Data-driven workflows can coordinate the numerous steps and stakeholders involved in critical processes, including account setup and the RFP response process. Pivotal CRM includes an event-tracking tool that allows users to invite select clients and consultants to events based on predefined criteria and preferences, manage registrations, and track attendance, making it easy to host high-value events without time-consuming administration. In-house policies and regulatory guidelines can also be built into the system for automatic compliance. Seamlessly



Track complex affiliations and relationships to uncover hidden opportunities and networks of influence



The fully personalizable dashboard allows individual users to select the information they want close at hand integrated with Microsoft Outlook, SharePoint, and the Office Suite, Pivotal CRM enables users to access the tools they use every day without ever leaving the CRM system, dramatically improving productivity and enhancing the user experience.

LEVERAGE PROVEN SALES METHODOLOGIES

Pivotal CRM for Institutional Asset Management contributes directly to the bottom line by implementing a structured selling approach based on industry best practices. This enables IAMs to increase their win rate and average deal size by improving resource management and focusing on the most profitable and promising deals. By providing more timely information and implementing proven action plans, Pivotal CRM reduces the duration of the sales cycle and increases the effectiveness and skill-level of your sales team. You even have the option of using Pivotal CRM to automate the Miller Heiman® sales process, the world's most respected sales methodology.

TAKE IT ON THE ROAD

Pivotal CRM for Institutional Asset Management gives users the ability to work while fully disconnected so they can take advantage of time-sensitive opportunities whether they're online or offline. Pivotal Mobile CRM gives instant access to client information and product literature—in fact, all the data stored in the Pivotal CRM system—while users are on the move, with the capacity to add key interactions, enabling users to work from the field as if they were in the office. Meanwhile, for users who don't wish to carry heavy laptops with them, Pivotal Handheld allows quick and simple access to key account information from RIM® BlackBerry® devices.

LET CLIENT PREFERENCES DRIVE COMMUNICATIONS

Today's clients know what they want and how they want it. Pivotal CRM for Institutional Asset Management enables IAMs to meet client needs by putting clients in the driver's seat. Communicate with clients via the channel they prefer, delivering the information they want. Using Pivotal CRM for IAM with MarketFirst™ ensures that requested research and publications are delivered to the right clients at the right time, without any tedious manual work by relationship managers.

DEVELOP REAL BUSINESS INSIGHT

Pivotal CRM for Institutional Asset Management enables users to effectively segment, analyze, and track clients to retain and grow their client base. Better client targeting delivers improved returns on marketing expenditures. The ease of implementing these processes gives IAMs the ability to realize substantial growth in assets under management with little or no increase in headcount, generating an impressive return on investment.

Pivotal CRM for Institutional Asset Management allows users to document relationships in detail, providing visibility into the complex interrelationships between contacts and clients. This information helps IAMs track and understand the influences consultants, brokers, and third-party administrators are having on accounts and services, as well as identify new opportunities. A comprehensive view of the factors and individuals tied to accounts can help IAMs allocate resources more profitably and nurture relationships strategically.

Better client insight is accompanied by better business insight. IAM executives can get a thorough overview of the performance of sales staff with a comprehensive view of all their sales force's activities, proposals, and RFPs, as well as sales summaries and details that can be used to identify corporate closing ratios and best practices. Pivotal CRM also gives institutional asset managers better visibility into their sales pipeline for improved forecasting and cash-flow management. It enables IAMs to gain a more balanced and holistic view of client value by understanding the costs associated with client profitability through views of marketing, sales, and service activities performed by the firm for a client.

Use Pivotal CRM for Institutional Asset Management for

- A 360-Degree Client View
- Workflow Management
- Consultant Management
- Proposal Tracking
- RFP Process Management
- Opportunity Management
- Sales Forecasting
- Activity Management
- Relationship/Influence Tracking
- Event Management
- Expense Tracking
- Regulatory Compliance
- Performance and Client Reporting

PIVOTAL CRM FOR INSTITUTIONAL ASSET MANAGEMENT: DESIGNED FOR TOTAL BUSINESS FIT

Pivotal CRM has the proven ability to dramatically increase productivity, grow assets under management, and foster strong client relationships in the institutional asset management business. The Pivotal CRM approach ensures a faster time-to-market with a lower total cost of ownership by delivering financial-services solutions on the flexible and scalable Microsoft®-technology-based Pivotal CRM platform, which supports rapid and easy customization, integration, and deployment. Institutional asset managers can rapidly and cost-effectively adapt Pivotal CRM to grow with their business—today, tomorrow, and in the future.

PIVOTAL CRM FOR FINANCIAL SERVICES SOLUTIONS INCLUDE:

Pivotal CRM for Mutual Fund Wholesaling™
Streamlines processes so team members can maximize opportunities at every broker interaction and increase productivity and profitability.

Pivotal CRM for Institutional Asset Management™
Enables collaboration between employees across the organization for unified, consistent service to institutional clients, promoting higher retention and growth.

Pivotal CRM for Commercial Banking™
Provides critical client information required by commercial banking relationship officers to be more efficient and productive.

Pivotal CRM for Capital Markets™
Provides the tools and information required for sales, trading, and research and investment bankers to manage the different aspects of the business.

Pivotal CRM for Private Banking™
Enables wealth managers to better manage and nurture high-net-worth client relationships.

APTEAN

More than 9,000 customers around the world rely on us to give them a competitive edge. By providing innovative, industry-driven enterprise application software, Aptean helps businesses to satisfy their customers, operate most efficiently, and stay at the forefront of their industry.

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