AdvisorTarget in Salesforce
A Self-service Data Analytics Platform

"ForwardLane's delivery system (for sales leads) was absolutely spectacular."
- *Vanessa Touma, Invesco Head of Client Strategy & Digital Sales*

ENABLE FORWARDLANE DELIVERY SYSTEM

Infrastructure for data analytics insights to be displayed within Salesforce

ACTIVATE ADVISORTARGET DATA

Proprietary, Curated Advisor Intent Data and Advisor IP Match Data

CREATE TIMELY SALES LEADS

Easily curate targeted product sales leads or go to market lists and apply segmentation… *within a day*.

ENABLE NEW DATA ANALYTICS

Sales, Marketing, Product, & Data Science Stakeholders can combine data with ease from data packs, Salesforce, transactions, holdings, etc. Compatible with LLMs and Gen AI.

Advisor Intent Data: Predictive behavioral data to engage the right advisor - with the right message – at the right time.
Advisor IP Match Data: Engage a specific advisor or a team of advisors who are researching your website.

ADVISOR INTENT DATA DELIVERED INTO SALESFORCE
User-friendly, financial advisor behavioral intent data that is integrated within Salesforce.

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Intent Data: Engage the right advisor - with the right message - at the right time.

IP Match Data: Engage a specific advisor (or a team) who is researching your website.

INSIGHTS DIRECTLY IN SALESFORCE OR INSIGHT CREATOR

With an industry-leading "Delivery System" you can skip the laborious ETL process and have insights delivered into an easy to install CRM widget. If you want to use this data for segmentation, you can access it in the Visual Insight Creator which enables non-technical users to easily review and use the data. Or elect to receive the data via a traditional flatfile or SFTP. The choice is yours.

ADVISOR INSIGHTS DIRECT

Advisor Intent. You have a wealth of data from sales, marketing, data packs, CRM - but do you have the most important data? This data gives you immediate insight into the products, tickers and investment strategies that advisors are interested in today. Through an ecosystem of 120+ partners, we cover more of the advisor market than any other data provider. Directly engage individual advisors through context-rich, timely signals based on customized keywords and categories to amplify distribution effectiveness. Using patented, cookie-free data capture technology in conjunction with data science, we provide a bundle of pre-qualified leads (at the individual CRD level) combined with Discovery Data's business profile and contact information to enhance your sales and marketing efforts.

Advisor IP Match. A database that Matches IP Addresses who are visiting your website to Financial Advisor CRDs. you want to use this data for segmentation, you can access it in the Visual Insight Creator which enables non-technical users to easily review and use the data. Or elect to receive the data via traditional flat file or SFTP. The choice is yours.

USE CASES

1. New Advisor Leads: Target investments Advisors are researching that align with your products

2. Take Out Campaigns: Surface Advisors searching for products that are less competitive than yours.

3. Cross Sell: Patented IP that exposes investments that Advisors are researching, so you can position your competitive products. Directly engage individual advisors through context-rich, timely signals based on customized keywords and categories to amplify distribution effectiveness.

4. Strategic Focus: Set your product and marketing priorities from trend data based on Advisor product look-up based on captured tickers / products that advisors are searching.

To get started:

1. A representative will contact you for details on a test drive.

2. We will provision sample data and a Salesforce interface for a test drive.

3. We will provide you with logins to access the test drive.