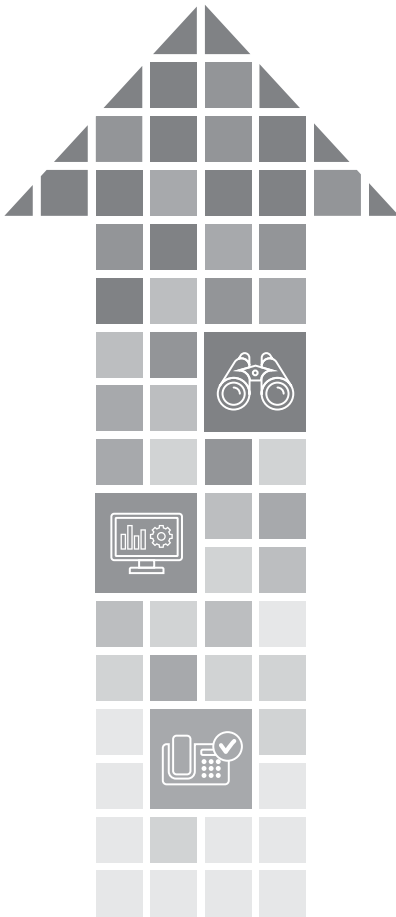**Prospecting**
Identify
low-hanging fruit

Preservation
Optimize and protect
existing business

Pre-call planning
Create targeted
messaging

*Save time and position yourself for the win with unique,
high-value and detailed client-level data and analytics*

Improve Sales Productivity

Do you have the information you need to:

- ☐ Prioritize target accounts based on size of opportunity
- ☐ Understand each company's next likely product need(s)
- ☐ Stay ahead of attrition risk
- ☐ Defend against competitors targeting your clients
- ☐ Support territory sales and management
- ☐ Identify product and service gaps across relationships

Our sales enablement and productivity tool provides actionable insights into prospecting, preserving and expanding current business and pre-call planning, so you can shorten your sales cycle by understanding:

- How companies view the performance of your bank's products and services
- Which companies and clients are being actively solicited by competitor banks
- How to tailor your sales strategy based on likely product needs
- Which of your accounts are "at risk" and need remediation
- Your competitor vulnerabilities at the account level
- Account-level insights for a productive and meaningful conversation

Optimize Sales Productivity

We have amplified the power of our unique, primary data, collected from thousands of interviews each year, with our proprietary machine-learning algorithms to uncover and win business.

Our sales enablement and productivity tool equips sales and marketing executives with unique, high-value data and detailed company-level information that helps to drive revenue by: (1) prospecting the most winnable opportunities, (2) protecting against previously unknown attrition risks, (3) deepening share of wallet with existing clients through targeted cross-selling initiatives, and (4) elevating pre-call planning effectiveness.

Win and Build Relationships

Know client and prospect product and service needs to focus on the highest value opportunities.

Sample Action Report

Identify Low-Hanging Fruit	Understand Which Clients Will Pay Off	Protect Against Attrition & Focus Where it Matters
Top Competitor Revenues at Risk	*Top Cross-Sell*	*Top Deepen Industries*
1. Sample Industrial ($494K) 2. Treatment Center ($185K) 3. Green Lawn Care ($155K)	1. Sample Gardens Enterp. ($592K) 2. Heavy Man Construction ($252K) 3. Black & White LLP ($148K)	**1. Admin/Support/Waste Mgmt** $6mm – 30% client wallet **2. Wholesale Trade** $4mm – 14 % client wallet **3. Construction** $3mm – 15% client wallet
Call to Action		
Priority 1	Priority 2	Priority 3
Marketing campaign to capture greater wallet share in the Admin/Support/ Waste Mgmt industry	Cross-sell into the following accounts: • Sample Gardens Enterprises • Heavy Man Construction	Acquire high and medium attrition risk with competitiors where upside is meaningful • Sample Industrial

Focus APIs: Actionable Data on Call

API connectivity gives your bank the power to transform sales, marketing and client retention operations through seamless integration with your internal systems, portals and other applications.

Make faster and more informed decisions

Manage customer needs efficiently and intelligently

Find new customers and optimize prospecting efforts

Connect to BI Tools
Embed customer attrition risk and prospect lead scoring, wallet share, lead bank identification, product need identification, and wallet estimates built on a database of over 1.25MM companies.

Create New Workflows
Combine our data seamlessly with your customer and transaction data, increasing banker productivity by remediating customer attrition, identifying the "next best product" for each customer, and closing product cross-sell gaps.

Get Sales Faster
Reduce time spent on company research and the sales cycle by over 50% with detailed information on prospects and integration in web, desktop and mobile.

Request Demo

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