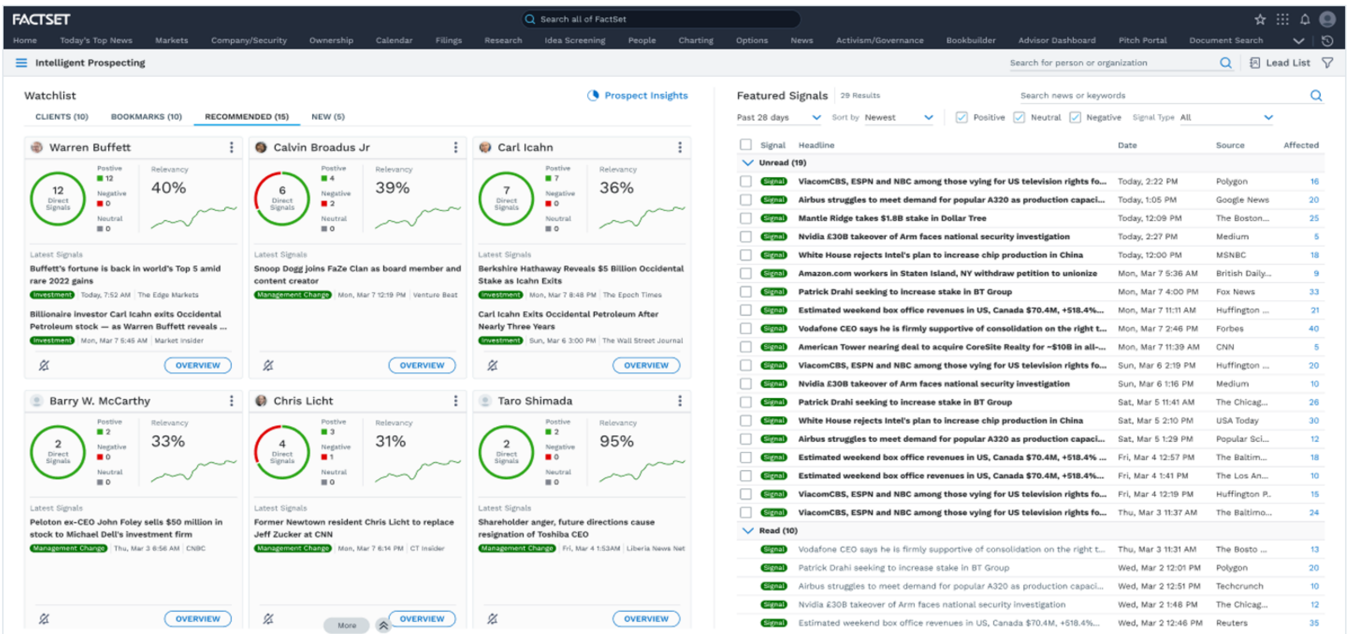
FACTSET

Intelligent Prospecting & Monitoring

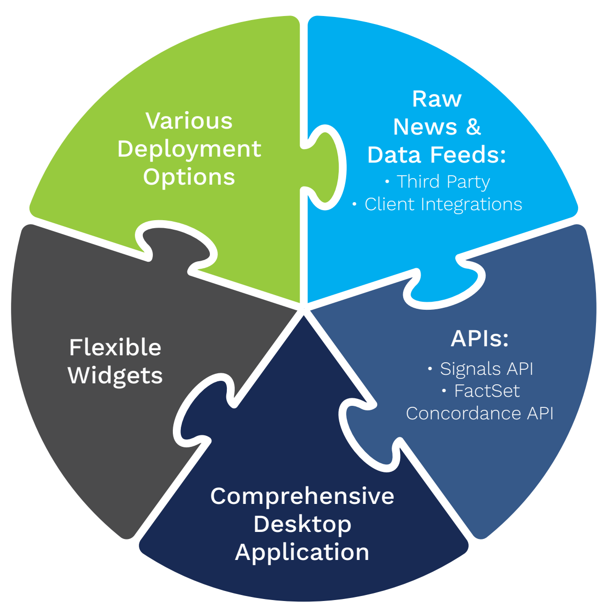
Assist your relationship managers in identifying new prospects, converting them into clients, and monitoring significant signal and event triggers affecting current clients with FactSet's client monitoring and prospecting tools.



MONITOR YOUR CLIENTS AND PROSPECTS

Stay up to date on key events and changes for your existing clients by leveraging proactive alerts and signals that notify you in real time. Reconcile disconnected information by building relationship graphs from your client interactions and demonstrate confidence when engaging with your clients by effortlessly highlighting the relevance of your data.

Support your advisors' search for new clients by setting up alerts based on territory, served client type(s), and other parameters. Provide a profile and briefing summary on all pertinent aspects and information helpful in engaging the prospect. Map the available knowledge graph or prospects and clients against the firm's and advisor's own relationship network to highlight further connections and strategies of approach through common acquaintances and traits.



MAXIMIZE EFFICIENCY WITHIN YOUR WORKFLOW

Customize your system to the needs of your organization by implementing client-specific signals along with content from your firm, the public domain, and third-party sources. Effortlessly deliver data through APIs and widgets by integrating your application into FactSet Advisor Dashboard, your CRM system, dedicated web application, or any other downstream systems.