Sales Analytics Program

An innovative sales management platform that provides advisors with virtually effortless analysis capabilities over an entire account base

An online, interactive tool that offers exhaustive strategic business analysis in an instant

Assessment in a Snap

Few reports offer as much insight into the health of an investment advisor's business than a comprehensive sales analysis. Highlighting strengths, weaknesses, and emerging trends, a thorough quantitative sales report allows an examination of the business from a variety of perspectives.

Yet the investment of time, energy, and resources to produce such a report on a regular basis can be daunting. Between downloading data, creating spreadsheets, and building graphs, an advisor can be kept busy on a full-time basis.

Committed to developing tools and systems that help improve the efficiency of investment advisors and their firms, Trust Company of America® has developed a comprehensive, interactive sales analysis application that generates multi-faceted reports on demand. As a result, advisors may fully focus on analyzing their account base from the angles they deem most important.

Additionally, for advisors who utilize representatives to market their services, the painless reporting process eases the sales analysis efforts – at either the individual representative or associated firm level.

Sales Analytics Application

Sales Analytics is a powerful and scaleable application that compiles statistical and numerical metrics across an account base. Seamlessly integrated into the Trust platform, ***Sales Analytics*** creates sophisticated analysis at the firm, representative, or account level with just a few clicks. Furthermore, the application's drill-down capability allows for deeper exploration of specific data in an instant.

How It Works

The ***Sales Analytics*** application is as easy to run as opening a program menu and selecting a starting screen. Automatically, the program runs extensive calculations, pulling account values and activity history from the Trust platform. Information is presented instantly in a number of formats including summary data, trends over time, and by different groups of account types. A double-click on a pie chart segment or table record launches a new window with analysis on the underlying data. A double-click on an account name launches the account's dashboard. Given the importance of the data provided, advisors choose what users are authorized to access the program and its valuable information.

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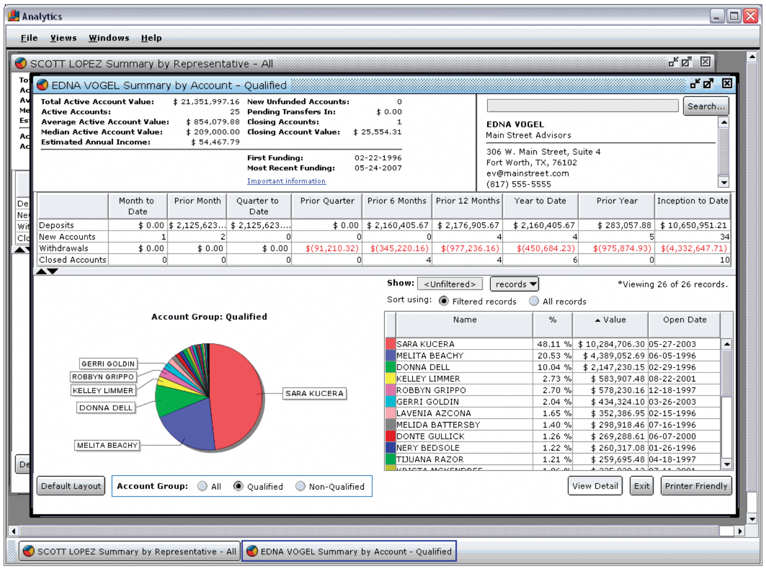

Features

Simplifying the sales analysis process, Trust's **Sales Analytics** application enables advisors to:

- Generate comprehensive statistical and numerical metrics across an account base without creating time-consuming reports
- View reporting for an entire account base or break it down by firm, representative, or account levels
- Analyze performance at any level over standard time periods or since account inception
- Easily project estimated annual income at each level of reporting
- Quickly visualize the breakdown of accounts, representatives, and firms
- Conduct different analysis on subgroups of the account base to align assessments with specific business models
- Determine what accounts, representatives, and firms generate and retain business
- Evaluate the relative performance of accounts, representatives, and firms to quickly determine the best (and worst) producers

Benefits

By using Trust's **Sales Analytics** to generate comprehensive data on an entire account base with minimal effort, advisors may find they can:

- Significantly reduce the time and energy required to conduct regular assessments of the business
- Reallocate resources previously devoted to the sales analysis process
- Identify and recognize trends that have a positive impact on the business, such as large inflows from a particular client, representative, or firm
- Identify and address trends that may be harmful to the business, such as outflows from a particular client, representative, or firm
- Identify possible risks to the business with regard to the account base, such as a disproportionately high level of assets within a relatively small number of firms, representatives, or accounts
- Commit additional time to building the business

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