

Enabling Next Generation Customer Insights & Interactions



How Wealth Managers can improve customer loyalty and increase revenues

DreamQuark's Customer Interaction platform, **Brain**, allows wealth managers to serve their customers with targeted insights and personalised propositions. This allows them to retain customers, convert deals and to grow AUM & profits.

Financial advisors, relationship managers and agents use the predictions of **Brain** to provide better product and investment advice to their clients. Customer success teams can use **Brain** insights to reduce the churn of their customers.

DreamQuark offers an end-to-end platform for that can be deployed rapidly, in a matter of days, to create immediate value.

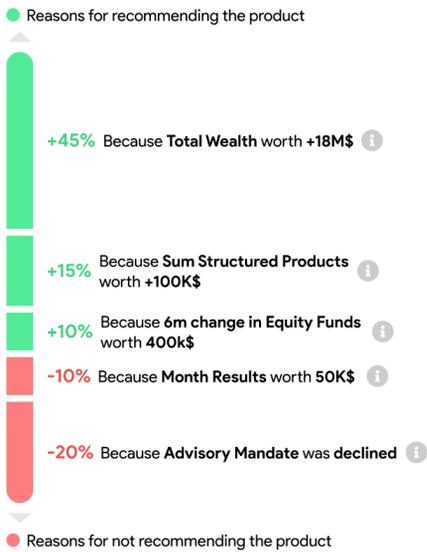
60%

of customers are not satisfied that their current wealth manager does not provide personalised updates about new products and services.

Source: Capgemini Financial Services Analysis, 2020

Turn your data into action in a few clicks

Why is this proposed for Darrell Steward?



Brain leverages patented Deep Learning and advanced algorithms, which benefit from years of in-house research and development. The platform provides users with explanations for every single prediction the platform generates, empowering business users to keep full control of the technology, validate business sense and comply with regulations & ethical standards.

Brain insights can be rapidly deployed through DreamQuark’s customer CX Apps or all scores are available to use immediately in existing CRM & Marketing applications.

Brain can quickly score customers for risk of churn and propensity to buy. You don’t have to be a highly trained data scientist to create and maintain customer insights. Using existing data, business teams can create models in an independent and agile manner using trusted and advanced AI, and relationship managers can quickly benefit from explainable advice.

Churn Score

0.378

DECISIONS	Churner
NeoBankTarget	1
LastInteractions	132
EvolPrimeAcquired	18,2
Age	55

Improve loyalty by understanding why customers are at risk of churn.

Recommendations

- Sustainable Investment Funds: Excellent Match (96%)
- Mutual Funds: Good Match (64%)
- Pension & Retirement: Low Match (41%)

Provide personalised recommendations of products and services based on customers profile.

Wealth Management companies can generate new revenues using explainable AI provided by **Brain**. With explainable AI relationship managers can deliver better investment recommendations to their customers, decreasing churn and increasing AUM. They can drive deeper engagement through more personalised insights.



Retain Customers



Convert deals



Grow AUM & profits

+75%

Uptake in product recommendation with better targeting and more relevant offers

DreamQuark's **Brain** is used today by leading Wealth Management customer BNP Paribas to improve customer loyalty & to increase revenues.



BNP PARIBAS

La banque d'un monde qui change

***“AI won't replace all advisors ...
but it will replace those
that don't use AI.”***

