Cover slide

Using predictive analytics for better sales channel management

* Profiling based on distributor performance

Slide 2:

Effectively manage and improve fund mobilization through distributors is both an operational and performance imperative for an AMC

An accurate and complete understanding of the distributor network is needed in order to better segment, target and manage the channel for improved sales performance and profitability

A hands on broker scorecard powered by predictive analytics and clustering technique will provide informed decisions on broker performance and help implement better strategy.

Slide 8

*Requirement*

* A framework to analyze overall sales channel performance against a number of key business variables
* Segment distributors into distinctive groupings

*Application*

The ability for AMC to identify potential distributors that are best aligned with the in-house products and engaging them with right perquisites may translate into sales growth. This is illustrated here by clustering and developing a model using a sample dataset from Reliance AMC.

*MF product types under consideration*

RMF types: (i) Equity, (ii) Debt, (iii) Liquid, (iv) Gold and (v) Others.

*Proposed Solution*

Produce ongoing and timely ranked lists of distributors through a scorecard.

Benefit and next steps

Analyze, discuss and act upon financial advisor network performance based on each distributor’s affinity and predicted behavior.

Target the right distributor at the right time and with the right message in order to strengthen relationships and maximize revenue.

Measure the success of channel sales program based on distributor segmentation

As ICRON has worked upon a smaller set of operational data, we feel that larger set of data and mapped commission structure can bring in much more insightful and a full functional broker scorecard and ranking framework.