



# Success stories in predictive analytics in Financial Services

Top 50 Best Companies to Work for in  
India 2016 – Silicon Review Magazine

Predictive Analytics Company of the  
Year 2014 – CIO Review Magazine

Top 20 Company in India - TiE Lumis  
Entrepreneurial Excellence Awards 2013

Top 50 Big Data Analytics Companies in  
India 2013 – CIO Review Magazine



# A financial services group improved advisors performance by analyzing factors that led to higher advisor effectiveness to optimize advisor trainings and performance management

## Objectives

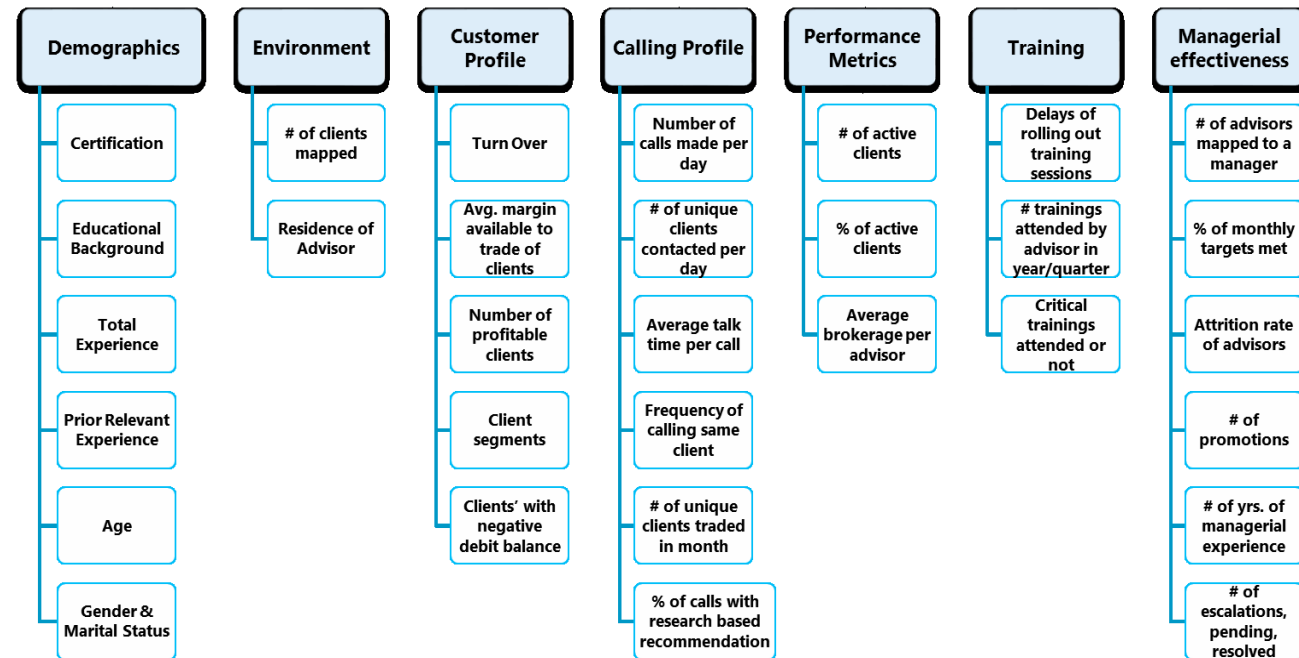
A large brokerage services company wanted to identify characteristics and behaviors of high – performing advisors to optimize advisors training and performance management and positively impact customer engagement and topline revenues

## Impact

- Identified key characteristics and behaviors of high performing advisors
- Designed effective training and performance management programs to bring average performers at par with high performers

## Our Approach

Multi-dimensional advisors' productivity analysis which was defined as customer activation rate and average brokerage earned per customer



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