The Avanade Agile Advisor Platform

Digital creates new opportunities to strengthen client relationships

How we can help you to improve customer experience with digital technology? »
Why Wealth Managers are Embarking on a Digital Journey?

Competitive pressures and digital-driven industry changes, like robo-advisory, are motivating wealth-management organizations to go digital. By 2020, it is expected that 10% of global assets will be managed by robo-advisors. Wealth-management organizations can take advantage of the opportunities created by digital advancements like algorithmic and automated investing to enhance their customer relationships and strengthen business performance.

Wealth-management firms that become truly digital redefine their traditional processes with digital capabilities. In many cases, this means transforming and elevating human-centric processes with digital. Financial advisors equipped with agile digital tools will be indispensable partners to their clients in managing their financial journey, as they are empowered to better understand and support the changes in their customer base. Mass affluent and emerging affluent are broader layers of investors and are thus more challenging to establish effective communication channels with.

Going digital starts with unlocking the availability of investment information and making it faster and simpler for advisors and their clients to analyze real-time information to make smarter investment decisions. But client value increases dramatically when the human-touch of financial advisors is enhanced with the digital agility to engage and support clients anywhere, anytime, on any device.

The Avanade Agile Advisor brings together the promise of algorithmic and automated advising with the value of human interactions to redefine client engagement in the digital age.

What Banks are looking for with Digitalization?

1. Help to reduce costs
2. Be more responsive/proactive than current bank employees
3. Provide more value-adding service and advice
4. Manage my personal/financial information more securely
5. Offer fewer data errors
6. Integrate better across multiple channels
How we can help you to improve customer experience with digital technology?

**Avanade Agile Advisor**

The Avanade Agile Advisor is a client-engagement solution that puts powerful investment-analytics capabilities in the hands of clients and their advisors. It enables clients and advisors to use robo-advising-like capabilities integrated with advanced communications tools to collaborate on and craft investment plans.

The analytics approach brings together data from valuable sources – customer, market, news, social and others – and applies high-performance analytics models to turn data into investment intelligence. Investment algorithms can then be applied to enhance investment intelligence.

Advisors and their clients can take advantage of digital tools to improve how they work together to craft investment plans. Clients can use a mobile-focused, self-service capability to create their own investment models. Models can be shared between clients and their advisors and embedded tools – including on-line chat and video conferencing – can be used to collaborate on investment decisions.

The Avanade Agile Advisor enables a next-generation workplace for advisors to enhance the way in which they support their clients. All client information is presented in a single view of the client, and that view and supporting tools are optimized natively for mobile usage. Advisors can support their clients anywhere, anytime and on any device, thereby improving the speed and convenience of client support.

Improving the accuracy, depth, speed and convenience of client engagement can provide the competitive advantage wealth-management organizations need in the digital age. The Avanade Agile Advisor can help wealth-management organizations digitalize client interaction and engagement.

**What we want to achieve with Avanade Advisor Platform?**

- **Empower the moment**
  - Ensure that each advisor is able to maximize the value from every client interaction.

- **Maximize opportunities**
  - Create multiple opportunities from each interaction enabling the advisor to grow their share of wallet.

- **Mobilize the office**
  - Provide as many of the enterprise systems we rely upon to the fingertips of the advisor.

- **Cost efficiency**
  - Maximize the value from every dollar invested in technology and infrastructure.

- **Get smart and get automated**
  - Incorporate analytics to provide true intelligence on performance. Minimize the drain on resources even while curating the experience.
### Why Consider Avanade Advisor Platform?

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<th>The Right Expertise</th>
<th>The Right Industry Fit</th>
<th>The Right Approach</th>
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### Who is Avanade?

Avanade is the leading provider of innovative digital and cloud-enabling services, business solutions and design-led experiences, delivered through the power of people and the Microsoft ecosystem. Majority owned by Accenture, Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation and has 29,000 professionals in 23 countries.

Visit us at [www.avanade.com](http://www.avanade.com)

### Here’s how to engage with us:

1. **Discovery Session**
   - Let us dig deeper on Avanade Advisor Platform

2. **Ideation Session**
   - Learn the art of possible

3. **Proof of Concept**
   - Let us prove what Avanade Advisor Platform is capable of

4. **Learn more**
   - [www.avanade.com/banking](http://www.avanade.com/banking)