

IBM Client Insight for Wealth Management on Cloud
Version March 2017

Solution Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 25.

Product Information

This document applies to IBM Client Insight for Wealth Management on Cloud and may also apply to subsequent releases.

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Introduction

The IBM Client Insight for Wealth Management on Cloud solution uses pre-built advanced analytics to help wealth management companies improve service, retain clients, and increase revenues.

Audience

This guide is intended for administrators and users of the IBM Client Insight for Wealth Management on Cloud solution.

Finding information

To find product documentation on the web, including all translated documentation, access IBM® Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. Some of the components included in the IBM Client Insight for Wealth Management on Cloud solution have accessibility features. For more information, see “Accessibility features,” on page 23.

The IBM Client Insight for Wealth Management on Cloud HTML documentation has accessibility features. PDF documents are supplemental and, as such, include no added accessibility features.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Samples disclaimer

Sample files may contain fictional data manually or machine generated, factual data compiled from academic or public sources, or data used with permission of the copyright holder, for use as sample data to develop sample applications. Product names referenced may be the trademarks of their respective owners. Unauthorized duplication is prohibited.

Chapter 1. Overview

The IBM Client Insight for Wealth Management on Cloud solution uses pre-built analytics to help wealth management companies improve service, retain clients, and increase revenues. It dynamically generates segmentation based on each client's profile and predicts life events by using historical data analysis. The solution provides insight that helps advisors to provide their clients with personalized advice and tailored portfolio recommendations.

The solution provides predictions on when a client is likely to remove their business from your company. The solution provides the reasons for the prediction and recommendations on how to maintain the relationship.

Capabilities of the solution

This version of the solution provides the following capabilities:

- Segments clients dynamically based on behavioral attributes and cash flow patterns.
- Prioritizes client focus based on the urgency of required actions.
- Predicts life events and determines the best actions for each client.
- Manages client attrition by increasing personalization based on the client's financial needs.
- Finds the best approach for each client's needs based on that client's propensity to accept various financial solutions.
- Analyzes an opted-in client's Twitter feed to determine the tone of that client's communication.
- Improves advisor productivity by providing relevant news articles and providing insight into market sentiments.

Chapter 2. Using the solution

The IBM Client Insight for Wealth Management on Cloud solution provides interactive pages from which you can explore your client base and individual clients.

The solution has two classes of users: Advisors and Managers. If you are an advisor, your dashboard uses data from all clients who are assigned to you. If you are a Manager, your Dashboard page uses data from the clients who are assigned to you plus the clients who are assigned to the advisors who report to you.

The solution provides the following pages:

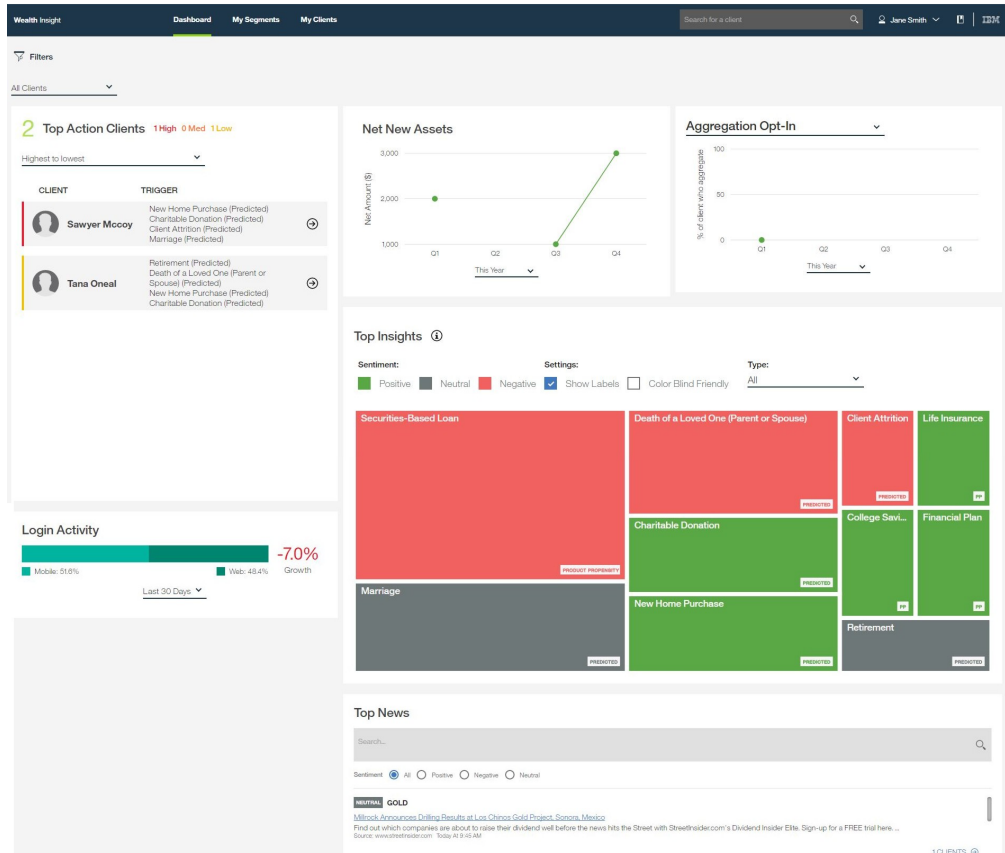
- Dashboard
- My Clients
- Client Profile
- Dynamic Insights
- My Segments
- The Manager page, which is available only to users who are classified as managers.

Dashboard for advisors

The Dashboard is the first page that appears when you log in to the IBM Client Insight for Wealth Management on Cloud solution. By providing important information, such as a list of your clients who require immediate attention, it helps you to make the most efficient use of your time.

The solution uses two classes of users: Advisor and Manager. For information on the manager dashboard, see “Dashboard for managers” on page 6.

When you log in to the solution as an advisor, the Dashboard page draws upon data for all clients that are under your management. You can filter the data that is used for the various measures in the Dashboard. For more information, see “Applying filters” on page 9.



Top Action Clients

The Top Actions Clients section displays a list of your clients that are in the most need of attention. It rates the urgency of action on your part as either high, medium, or low and provides the reasons that triggered each client's inclusion in the list.

Net New Assets

The Net New Assets chart is a line graph that shows the value of new assets under management that you acquired over a specified time period. This chart represents only assets that are under your company's management. It does not include any external assets that the client might own. You can select a time period that ranges from the current week to the past five years. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

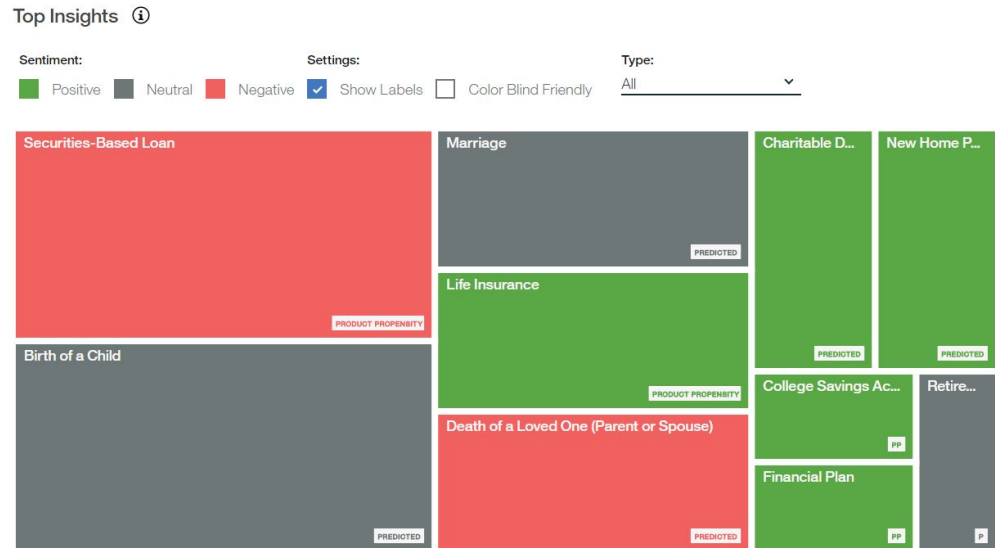
Aggregation Opt-In or Assets Held Internally

When you click the title of this chart, you can choose to show the amount of your clients' assets under your management or an aggregation that includes assets outside of your management. For example, you might have information on external assets, such as real estate, that contributes to a client's net worth. The line graph shows the change in the asset amounts for the period that you select. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

Top Insights

The Top Insights heat map uses color and size to communicate the most important 10 insights from your data. Insights are related to either a predicted event or a propensity. A predicted event is an event that is predicted to occur within the current month. A propensity is represented by a score that indicates the likelihood that a client will behave in a certain way within the current month.

In the following screen capture, it can be seen that propensity for a securities-based loan, which has a negative sentiment, is the largest issue that is related to the data.



The scope of the data for this measure is determined by the selections that are made in the Filters pane. You can filter your data further by using the Type control to include Predicted Event, Propensity, or All. You can choose to hide labels and use color-blind friendly colors. When you click an area on the chart, a window provides information and displays links to the dynamic sub-segments and clients that are represented by that area of the chart. For example, the following screen capture shows the menu that is displayed when you click the Securities-based Loan area of the Top Insights chart.



Login Activity

Login Activity shows the percentage change in the number of times that your clients logged in to the solution for the time period that you select. It also indicates the percentage of logins that are from mobile devices versus the number of logins from computers.

Top News

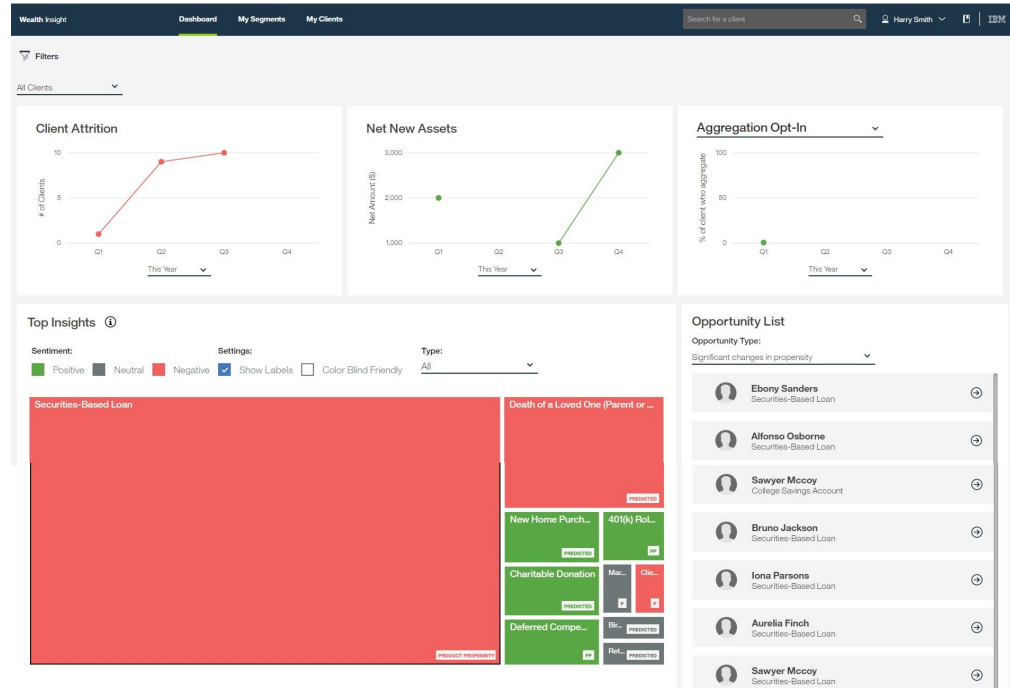
The Top News section provides links to the top news stories for the current day that are relevant to your clients. You can choose to filter the links by sentiment or search for a particular news story.

Dashboard for managers

The Dashboard is the first page that appears when you log in to the IBM Client Insight for Wealth Management on Cloud solution.

The solution uses two classes of users: Advisor and Manager. For information on the advisor Dashboard, see “Dashboard for advisors” on page 3.

When you log in to the solution as a manager, the Dashboard page draws upon data for all clients of all advisors who are under your management. You can filter the data that is used for the various measures in the Dashboard. For more information, see “Applying filters” on page 9.



Client Attrition

The Client Attrition graph displays the number of your clients who removed their business from your company over the time period that you select for the graph. The scope of the data for this measure is determined by the selections that are made in the Filters pane. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

Net New Assets

The Net New Assets chart is a line graph that shows the value of new assets under management that you acquired over a specified time period. This chart represents only assets that are under your company's management. You can select a time period that ranges from the current week to the past five years. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

Aggregation Opt-In or Assets Held Internally

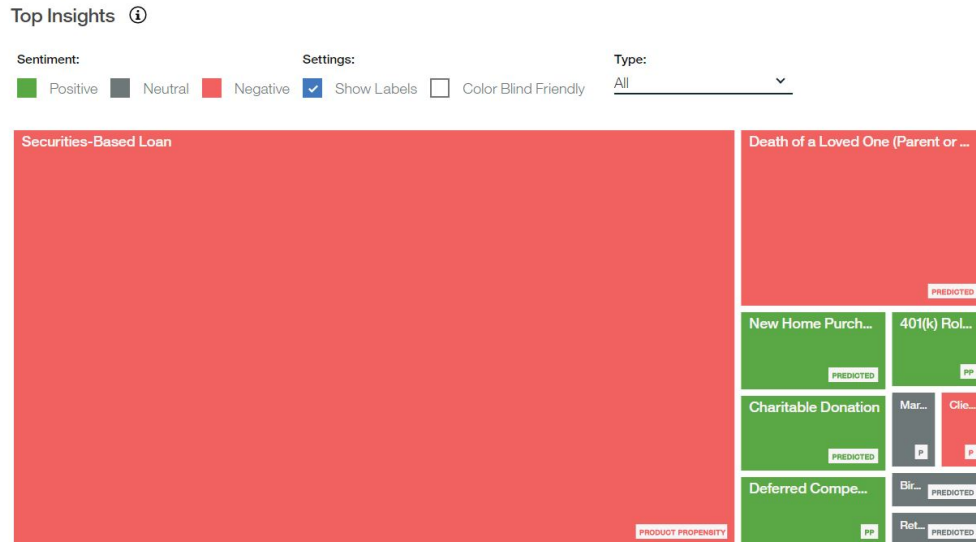
When you click the title of this chart, you can choose to show the amount of your clients' assets under your management or an aggregation that includes assets outside of your management. For example, you might have information on external assets, such as real estate, that contributes to a client's net worth. The line graph shows the change in the asset amounts for the period that you select. Hover your mouse pointer over a data point on the graph to see the percentage change from the previous data point.

Top Insights

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current month. A propensity is represented by a score that indicates the likelihood that a client will behave in a certain way within the current month.

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The scope of the data for this measure is determined by the selections that are made in the Filters pane. You can filter your data further by using the Type control to include Predicted Event, Propensity, or All. You can choose to hide labels and use color-blind friendly colors. When you click an area on the chart, a window provides information and links to the dynamic sub-segments and clients that are represented by that area of the chart. For example, the following screen capture shows the menu that is displayed when you click the Securities-based Loan area of the Top Insights chart.



Login Activity

Login Activity shows the percentage change in the number of times that your clients logged in to the solution for the time period that you select. It also indicates the percentage of logins that are from mobile devices versus the number of logins from computers.

Applying filters

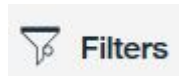
You can apply filters to determine which clients are included in the data that you are analyzing.

About this task

From the Dashboard, My Segments, or the Client List pages, you can apply or remove filters. The filters that you apply are in addition to the filters that are applied automatically when you select an area in the Top Insights chart.

Procedure

1. From the Dashboard, My Segments, or Client List page, click the Filters icon



2. Select the filters that you want to apply.
3. Click **Apply**.

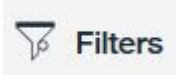
Results

The filters are applied and continue to be applied as you move from page to page throughout the solution.

Client List

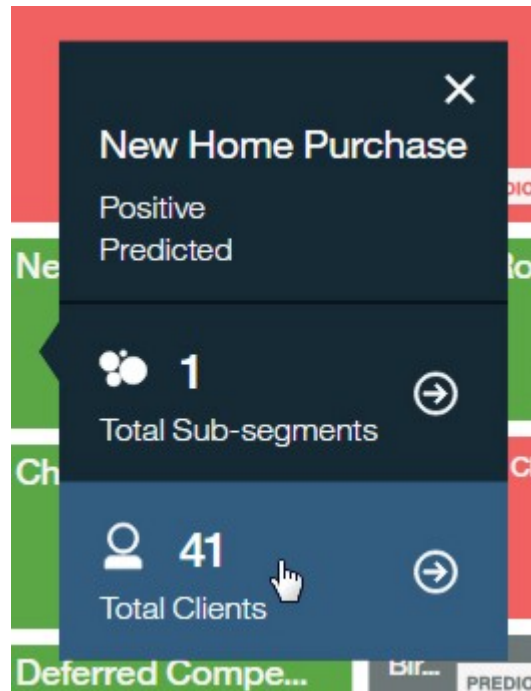
When you log in as an advisor, the client list draws upon all of the clients who are assigned to you. When you log in as a manager, it draws upon all of the clients who are assigned to you and to the advisors who report to you. The Client List provides a list of all clients who meet the criteria that is specified by the filters that you select.

The Client List reflects any filters that you applied in the Dashboard. You can

change or apply filters to the list by clicking the Filters icon . For more information, see "Applying filters."

You can access a client list in the following ways:

- In the Dashboard page, click the **My Clients** link in the menu bar.
- In the menu bar, enter a name or part of a name in the **Search for a Client** box.
- In the Dashboard page, click an area in the Top Insights chart, and from the pop-up menu, select the **Total Clients** option.



- In the Dynamic Insights page, select a sub-segment, and from the pane that shows the attributes for the sub-segment, click the number of clients.



The Client List provides summary information on each client in the list. To view addresses and advisor names for all clients in the list, click **Expand All**. To view the address and advisor name for a single client, click **View Details**.

You can export a client list to .csv format so that it can be displayed and distributed as a spreadsheet. You can specify that the exported list includes all clients in the list or only selected clients. For more information, see “Exporting a client list.”

Exporting a client list

From a Client List, you can export a list of selected clients to a .csv file that can be opened in spreadsheet software and distributed.

Procedure

1. In a client list, click **Export**.
2. In the Export Client List window, type a name for the .csv file and specify whether to export only selected clients or all clients.
3. Click **Export**.

Results

A .csv file is created, which you can open in a text editor or a spreadsheet program.

Client Profile

The Client Profile page provides information about a client, insights to help you to understand the client, and opportunities for providing the best possible service to the client.

The Personal Information section, displays the client's address, a link to the client's email, and a button for adding a Twitter account.



If you add a Twitter account for a client, then the client's most recent five tweets are displayed on the Communication tab. The Communications tab also contains the Communication Tone Analyzer that determines the tone of the client's tweets over the time period that you specify.

If a Twitter account is already added for the client, then the account name is displayed in place of the **Add Twitter Account** button. For more information, see "Adding a client's Twitter account" on page 16 and "Removing a client's Twitter account" on page 17

The Client Profile has three tabs: Insights, Portfolio, and Communication.

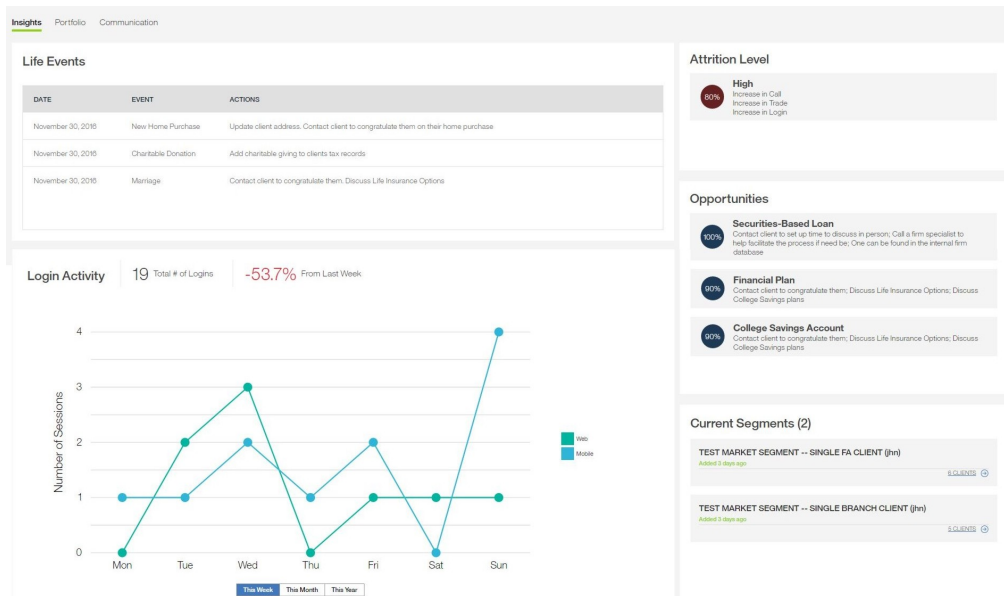


Insights

The Insights tab provides the following features:

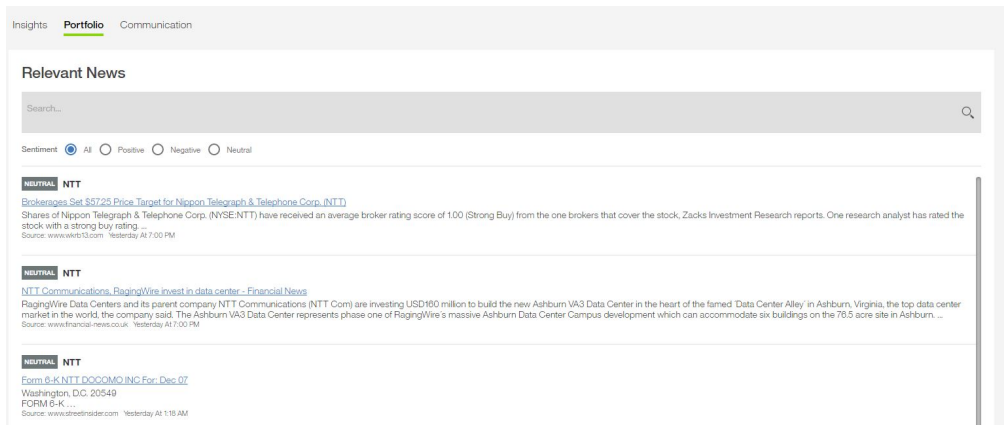
- The Life Events table lists any events for the client that are predicted to occur soon along with suggested actions for the advisor.
- The Log in Activity chart shows the frequency with which the client logged in over the past week, month, or year.
- The Attrition Level indicator provides the percentage likelihood that the client will leave your company.
- The Opportunities list provides the opportunities for increasing your business with the client.

- The Current Segments list identifies the dynamic segments that the client is included in.



Portfolio

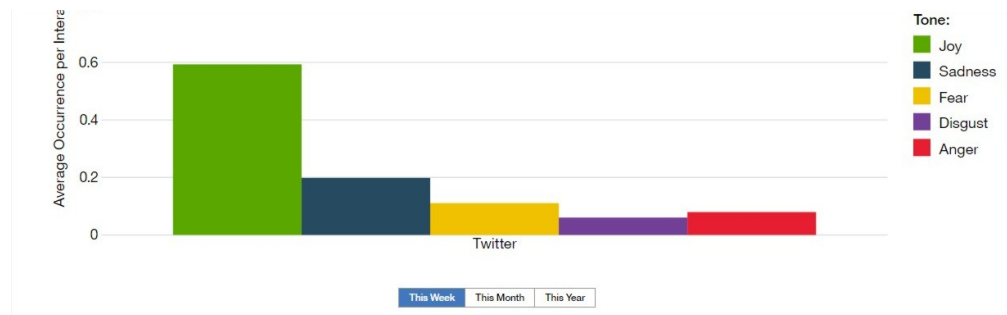
The Portfolio tab provides links to articles that are related to investments that are held in the client's portfolio. You can filter the list of articles by sentiment.



Communication

The Communication tab provides a Communication Tone Analyzer chart and a Recent Twitter Feed list. Both of these features display data only if a Twitter account is connected to the client's profile. For information on adding a Twitter account, see "Adding a client's Twitter account" on page 16

The Communication Tone Analyzer provides an analysis of the tone that is displayed in the client's tweets for the time period that you select.



The Communication tab provides the Conversation Starters list, which provides links to articles related to a client's interest. You can filter the articles by selecting sentiments of positive, negative, or neutral.

Insights Portfolio **Communication**

Conversation Starters

All
 Positive
 Negative
 Neutral

New England Patriots
 Squash
 World Travel
 Add An Interest

TOPICS

NEUTRAL

[Without Gronk, New England Patriots counting on the quirky and tough Martellus Bennett](#)

Regardless of which moniker you want to give them, the duo has now become a solo act, as Gronkowski has been relegated to injured reserve following a back injury. But while the loss of a monster pass-catching tight end for the rest of the season is a setback for the Patriots' passing game, it's not the crippling blow that it would be to many teams. ...

Source: www.profootballweekly.com Yesterday At 7:00 PM

POSITIVE

[New England Patriots coach Bill Belichick loves talking lacrosse with Baltimore media](#)

The Ravens and New England Patriots have met seven times since 2010 including four times in the playoffs. Bill Belichick might prefer not to see the Ravens that often in the postseason, but one thing the New England coach does enjoy is talking lacrosse when he hops onto a conference call with Baltimore reporters....

Source: www.baltimoresun.com 2 Days Ago At 7:00 PM

NEUTRAL

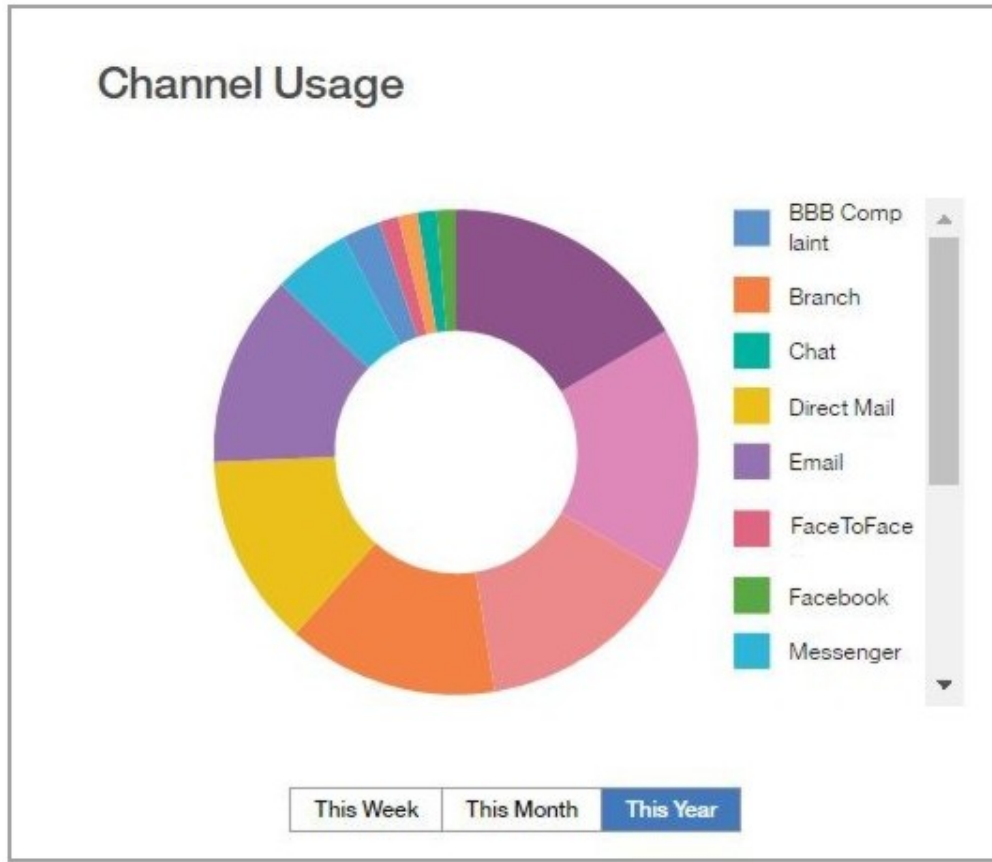
[The New England Patriots will not wear their throwback uniforms anytime soon due to NFL rule](#)

The highly popular "Pat Patriot" red throwback uniforms will not be seen on Tom Brady for quite some time. After they introduced the "Flying Elvis" logo in 1993, the New England Patriots have very rarely went back to the old red throwback look and now it seems like it may be gone for good. ...

Source: nep.247sports.com 4 Days Ago At 7:00 PM

From the Communication tab, you can add interests for the client. For example, if you learn that a client is interested in the New England Patriots football team, you can add it to the client's profile as an interest. For more information, see "Adding an interest to a client profile" on page 14.

The Communication tab also includes the Channel Usage chart, which indicates how the client communicated with your company over the time period that you select.



Adding an interest to a client profile

In the Conversation Starters section of a client profile, you can add an interest for the client. The Conversation Starters feature searches for and displays articles that are related to that interest.

Procedure

1. In a client profile, click the **Communication** tab to display the **Conversation Starters** feature.
2. Click **Manage Interests**.
3. In the Manage Interests window, type the interest that you want to include for the client.

For example, if you learn that the client is interested in baseball, you can add that as an interest. The Conversation Starters feature then displays news items that are related to baseball.

4. Click **Add**.
5. Click **Save**.

Deleting an interest from a client profile

In the Conversation Starters section of a client profile, you can delete an interest for the client.

Procedure

1. In a client profile, click the **Communication** tab to display the **Conversation Starters** feature.

2. Click **Manage An Interest**.
3. In the **Manage an Interest** window, hover your mouse pointer over the interest that you want to delete.
4. Click the x that is displayed for the interest. In the following example, you would click the x to delete squash as an interest.

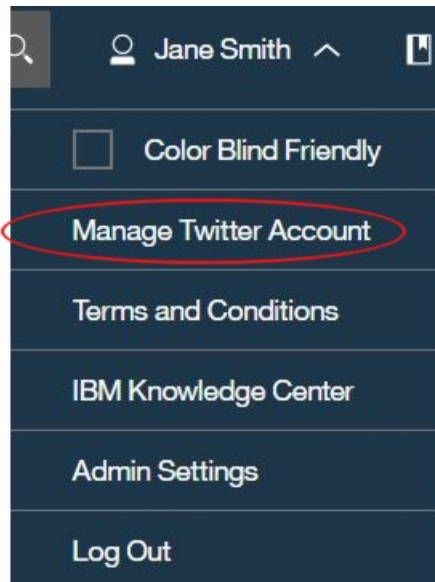
The screenshot shows a 'Manage Interests' dialog box. At the top, there is a title bar with the text 'Manage Interests' and a close button (X). Below the title bar is a text input field with the placeholder text 'Type in an interest' and an 'Add' button. Underneath is a section titled 'Selected Interest(s):' containing a list of interests: 'Football', 'Music', and 'Squash'. The 'Squash' item is highlighted and has a small 'x' icon to its right. At the bottom right of the dialog is a 'Save' button.

5. Click **Save**.

Twitter

With the consent of a client, you can connect one or more Twitter accounts to the client's profile. The client's tweets are analyzed by the Communication Tone Analyzer to provide insight into the tone of a client's communication.

From the Client Profile page, a Twitter account can be added to a client's profile. Before you can add a Twitter account for a client, you must be signed into Twitter. You can sign in or out of Twitter by clicking your name in the menu bar and selecting the Manage Twitter Account command, which is shown in the following screen capture.



When you add a client's Twitter account, an email that requests permission is sent to the client. If the client clicks a link to opt in, then the Twitter feed is added to the profile. After a client opts in, the client's most recent five tweets are displayed on the Communication tab of the Client Profile page. The tweets are analyzed for tone by the Communication Tone Analyzer. The Communication Tone Analyzer derives insights from all the tweets for the period that you specify.

Behavior of the Twitter Feed and Communication Tone Analyzer

Be aware of the following behaviors that are related to the Customer Profile page:

- The Communication Tone Analyzer uses only tweets and not retweets.
- Advisors see only tweets from Twitter accounts that they added for a client. If two advisors share a client, each advisor does not see Twitter feeds that were added by the other advisor.
- By default, the Communication Tone Analyzer is updated after every 10 tweets.
- Managers see the Communication Tone insights of two or more Twitter profiles if two or more exist for a client.
- For each client, managers see the Communication Tone insights for all of the advisors that they manage. However, they do not see the Twitter feed unless they added the Twitter account for that client.

Adding a client's Twitter account

From the Client Profile page, you can add a client's Twitter account. After you add an account, you can see the client's previous five tweets. The Tone Analyzer uses the tweets to determine tone.

About this task

To add a client's Twitter account, you must first sign in to Twitter. When you choose the client's twitter account, an email that asks for permission to use the account is sent to the client. After you add a client's twitter account and the client opts in, then that client's previous five tweets are displayed in the Communications tab of the client profile page. The client's tweets are used by the Communication Tone Analyzer to determine the tone that is expressed in the tweets.

Procedure

1. In a client profile, click **Add Twitter**
2. Sign in to your twitter account.

You must be signed in before you can add a client's Twitter account.

If an email address is not specified in the database, a message prompts you to add an email address for the client. An address is required so that the client's permission to view the Twitter account can be requested by email. Client information, such as email address, cannot be added through the interface of the solution. It must be added to your database.

3. Use the **Search** box to find the client's Twitter account, and click **Save**.

If the client's Twitter account is protected, you must first be a follower of the account before you can add it.

4. In the message that informs you that you must send an opt-in email to the client to receive approval, click **Confirm**.

In your email application, a draft email is displayed that is addressed to the client and asks for permission to add the client's Twitter account. The email contains a link that the client can use to opt in. You can edit the email to personalize it.

5. Send the email to the client.

After you send the email, the Personal Information section of the Client Profile page shows the message: Pending Twitter Opt-in. The client's Twitter feed is available to you only after the client clicks the link in the email to opt in.


Removing a client's Twitter account

From the Client Profile page, you can remove a client's Twitter account.

About this task

When one or more Twitter accounts are connected to a client's account, they appear in the Personal Information section of the Client Profile page and can be removed.

Procedure

1. On the Client Profile page, in the Personal Information section, click the edit icon .
2. In the Add a Twitter Account window, click the X that is displayed for the connected account that you want to remove.

Dynamic Insights

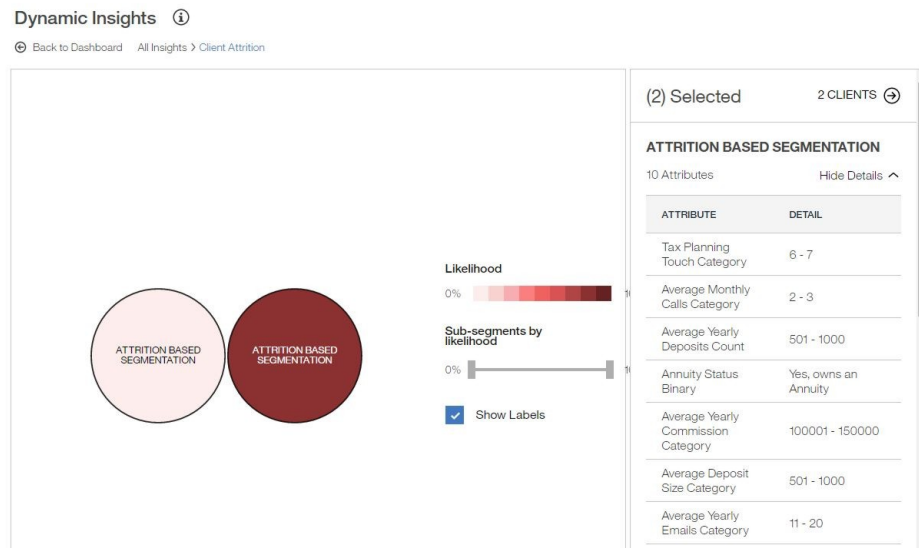
The IBM Client Insight for Wealth Management on Cloud solution uses dynamic segmentation analytics to create real-time types of clients. Dynamic segmentation is based on client data that includes propensities. The Dynamic Insights page provides a visual representation of the number of clients in each segment for the opportunity type and filters that you chose on the Dashboard page. The Dynamic Insights page can be accessed only from the Dashboard page.

The Dynamic Insights page is accessed from the Dashboard when you click an area of the **Top Insights** chart and then click **Total sub-segments** option.

On the Dynamic Insights page, you can add or remove filters that you applied on the Dashboard page. Dynamic segmentation is based on attributes, such as age,

marital status, and annual salary. A table indicates the attributes that determine which customers are included in a selected segment.

The following page was accessed by clicking **Client Attrition** from the **Top Insights** chart on the Dashboard and selecting **Total Sub-segments**. It provides a representation of the segments that have a propensity for attrition. This example shows two segments. One segment with a low propensity and another with a high propensity for attrition. You can use the slider to filter by the likelihood of attrition.



To see the number of customers that are represented by a bubble, hover your mouse pointer over that bubble.

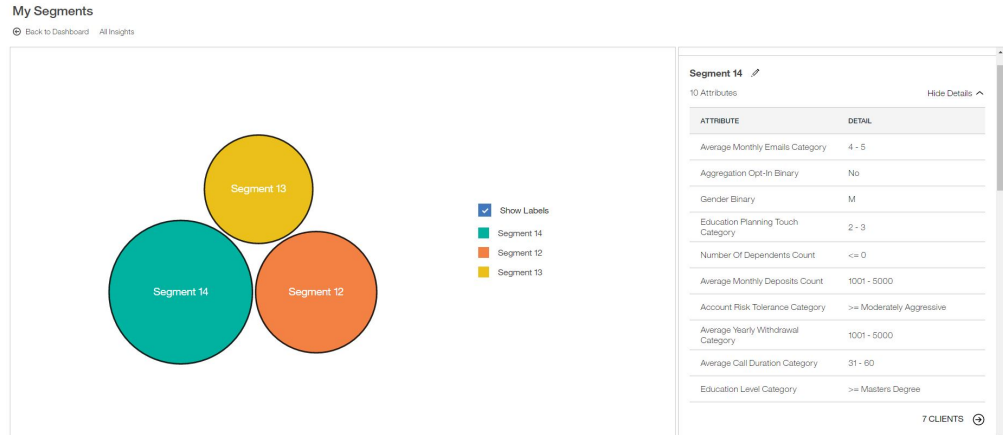
When you select one or more bubbles, a summary of clients in the selected segments is shown in the table. You can select or deselect multiple bubbles by clicking them.

From the table, you can click the number of clients to view the client list. If more than one bubble is selected, you can view a list of all clients in the selected segments by clicking the number of clients. You can also view a list of only clients for a selected segment by clicking the number of clients for that segment in the table.

My Segments

The solution provides two types of segmentation: dynamic segmentation, which reflects all data for a client, including propensities, and general segmentation, which includes the same data but without including propensities. The My Segments page provides a visualization of the general segments within your client base. From the My Segments page you can find your segments, rename them, save groups of segments, and open or delete your saved segments.

When you click **My Segments**, and then click **Find My Segments**, a chart displays bubbles for each of the general segments for your client base. When you select one or more segments by clicking in the bubbles, a table lists the attributes that determine each of the segments.



Saving a group of segments

From the My Segments page, you can rename segments and save groups of segments. The segments that you save can be applied to your Dashboard page.

Procedure

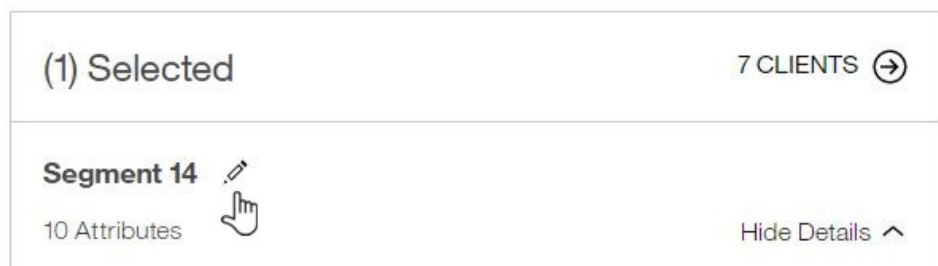
1. If you any filters are applied, deselect them.
2. From the menu bar, click **My Segments**.
3. Click **Find My Segments**.
All of the general segments that your clients fall within are displayed.
4. Click **Save**.

Renaming segments


From the My Segments page, you can provide meaningful names for the segments that you save.

Procedure

1. If you any filters are applied, deselect them.
2. From the menu bar, click **My Segments**.
3. Click **Find My Segments**.
All of the general segments that your clients fall within are displayed.
4. Select the segments that you want to rename.
5. In the panel, click the name of the segment.
6. Click the edit icon, as shown in the following screen capture.




7. Type a name for the segment and click the check mark.
8. Click **Save**.

You can also rename a saved segment by clicking the Saved Segments icon , and clicking the pencil icon for the segment that you want to rename.

Applying saved segments to filters

After you save a group of segments, you can apply them to filters.

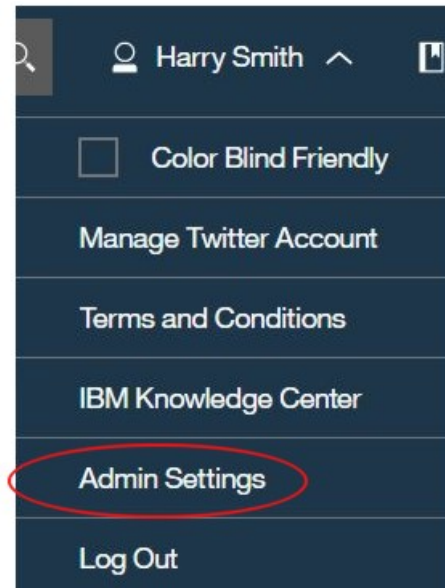
Procedure

1. In the menu bar, click the **Saved Segments** icon .
2. For the saved segment that you want to apply, click **Apply to Dashboard Filter**.

Chapter 3. Administration

The Administration settings allow an administrator to grant either Admin or User privileges to each individual user account and to manage API keys. Admin privileges enable users to generate API keys in order to use public REST API calls.

If you are granted Admin privileges, you can access the Admin Settings by clicking your name in the menu bar.



In the Admin Settings window, you can manage API keys. You can also grant admin privileges to other users so that they can manage API keys.

Managing users

If you have Admin privileges, you can set the permissions for each user to either User or Admin.

About this task

Admin privileges provide access to the Admin Settings functions, which enable a user to manage API keys.

Procedure

1. From the Dashboard or any of the pages in the solution, click your name.
If you have Admin privileges, the **Admin Settings** option is available from the pull-down menu.
2. Click **Admin Settings** and select **Manage Users**.
3. On the Manage Users page, click the Permissions column for a user, and set it to either **User** or **Admin**.

Managing API keys

If you have Admin privileges, you can generate API keys in order to use public REST API calls.

Procedure

1. From the Dashboard or any of the pages in the solution, click your name.
If you have Admin privileges, the **Admin Settings** option is available from the pull-down menu.
2. Click **Admin Settings** and select **Manage API Keys**.
3. To create an API key, type a name for the API key, and click **Generate API Key**.
After an API key is created, it is displayed and you can revoke it or change its name.

Appendix. Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products.

For information about the commitment that IBM has to accessibility, see the IBM Accessibility Center (www.ibm.com/able).

IBM Cognos® HTML documentation has accessibility features. PDF documents are supplemental and, as such, include no added accessibility features.

Report output

In IBM Cognos Administration, you can enable system-wide settings to create accessible report output. For more information, see the *IBM Cognos Analytics Administration and Security Guide*. In IBM Cognos Report Studio, you can enable settings to create accessible output for individual reports. For more information, see the *IBM Cognos Report Studio User Guide*. You can access the previously mentioned documents at IBM Knowledge Center (<http://www.ibm.com/support/knowledgecenter>).

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