

## ADVIZOR In Financial Services

ADVIZOR Solutions® visual discovery™ software enables people to make better and faster fact-based decisions from their business data. Powered by patented data visualization and predictive analytics technology, ADVIZOR is world-class in empowering people to display, analyze, and share their business information.

### Proven Business Benefits for Financial Services

ADVIZOR enables analysts and end-users throughout a financial services organization to understand and profit from key business data by going beyond traditional text, table and graphical data representations. This allows greater numbers of people to quickly make accurate and informed decisions. ADVIZOR supports Global 2000 financial services firms with key business problems in important functional areas such as:

- Market and credit risk
- Trade analysis
- Product portfolio planning
- Market research
- Promotional effectiveness
- Customer analysis & segmentation
- Financial analysis and planning
- Human resources



ADVIZOR provides information in clear displays with dynamic interaction so that managers quickly get fact-based answers to business questions.

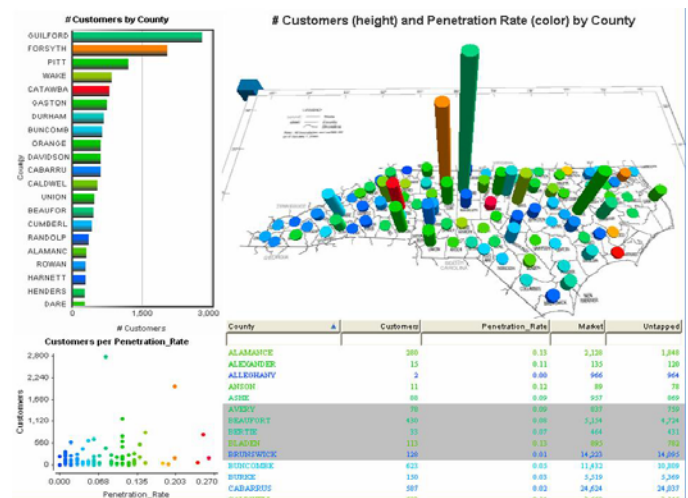
## Operations

### Market and Credit Risk.

ADVIZOR visual discovery is ideal for presenting high level position overviews and alert indicators, with the ability to then quickly drill down into the detail to determine which combinations of product, traders/managers, customers, and geographies are causing in or out of band performance. Results are easily communicated to management in standard office tools.

### Trade Analysis

Progressive financial services firms are creating competitive advantage by delivering insightful information to their sales teams, distribution channels, and customers. This information allows managers to answer questions about sales, products, and performance versus peer groups in an easy, intuitive, and interactive manner over the web.



Questions include the likes of: (1) “why is the rep in Atlanta doing so much more than his peers in Chicago and Dallas”, (2) “why is one product selling so well in the Northeast, but other products aren’t moving at all”, (3) “who are the best customers in the southwest”, or (4) “where are the upcoming maturities and where can we expect sales pickup”.

## **Network Intrusion & Security.**

The key to minimizing network and system intrusion is to quickly spot patterns of unusual behavior across millions of events, and then to explore underlying data. ADVIZOR was designed, originally in Bell Labs, to do just this.

## **Sales and Marketing**

### **Product Portfolio Planning.**

ADVIZOR is ideal for working with multi-dimensional associations that are difficult to see and cut through in traditional display formats. This is critical for making informed tactical and strategic product decisions.

### **Market Research.**

The goal of market research is to explore and correlate findings, driving towards segments and causal factors. Typical “cross-tabs” are cumbersome and difficult to work with. ADVIZOR creates a visual dashboard that is highly intuitive, faster, and easier to work with. Communication and decision making are greatly accelerated.

### **Promotional Effectiveness**

A key to developing and executing effective promotions is to understand the timing and impact on products sold in specific locations and channels. Detailed comparative performance by products by location and customer type over time at both a summary and a detailed line-item level are easily analyzed with ADVIZOR. Animation can enhance patterns of change over time. Visual Discovery facilitates correlation, slice and dice, and drill down.

### **Customer Analysis & Segmentation.**

Often a superset of Market Research combined with transaction / CRM data, these datasets are highly multi-dimensional and require human exploration to discern what is impacting behavior and why. ADVIZOR is ideal for identifying segments of common behavior, outliers, and the descriptive factors behind them.

## **Finance and Administration**

### **Financial Analysis and Planning.**

Significant value can be realized by understanding financial trends over time from summary-to-detail levels. Understanding the reasons why top producers and top products are outperforming others is hard to determine from basic financial reports. This level of analysis is dramatically improved with ADVIZOR

### **Human Resources.**

Comparing and contrasting the behavior of 100,000 people to understand what drives good performance, identifying where labor shortages are expected and planning for the future requires the ability to slice and dice through highly multi-dimensional data. Finding are often shared with managers and executives who are not trained in data mining and query techniques. ADVIZOR’s visual approach to the display and analysis of business data is ideal for this purpose.

## **Transform Decision-making with Visual Discovery**

Visual Discovery is the core patented technology that drives ADVIZOR’s unique display, interaction and authoring capabilities. Leveraging an extensive algorithmic underpinning, business people are able to explore and understand their business data. ADVIZOR’s unique display and interaction capabilities address key needs:

- End-users want to interact with their data as they are looking at it – they do not want to use other tools, understand database structures or wait long for results.
- End-users want to explore their data – especially when there are not pre-defined paths to answer their questions.

With ADVIZOR the visual display becomes the window to understanding, which leads to better business decision-making and improved value.

[www.advizorsolutions.com](http://www.advizorsolutions.com)

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