Top sales ideas and best practices

Assess your competition

In the competitive landscape of asset management distribution, we believe it is essential to understand how you stack up against your peers.

- **Competitor Flows**
  - Ability to filter grid to specific security or style to see competitors within your product type.
  - Found in menu item 'Assets & Flows Detailed View.' Select 'Competitor Flows.'
- **Performance Asset Ranking**
  - Ability to select performance by security type to see products ranked by assets across Envestnet.
  - Found under 'Product Drivers.' Select 'Performance and Asset Ranking.'

Manage and find new opportunities

Envestnet Analytics can be an essential tool in key account management and distribution/sales, not only helping you navigate your existing shelf space opportunities, but also helping you identify the new ones.

- **Asset + Flows Opportunity**
  - Best for identifying existing shelf space with low market share.
  - Found under the 'Opportunity' menu item. Select 'Asset & Flows Opportunity.'
  - After identifying these firms, find their advisor's contact information under 'All Advisors Using Envestnet.'
    - That can be found under menu item 'Assets & Flows Detailed View.' Select 'Advisor Analytics,' then 'All Advisors Using Envestnet.'
    - Create a pivot table by right clicking and selecting 'pivot' to add contact information for advisors.
- **Advanced Opportunity – SMA, FSP, MF, and ETF**
  - Best for looking for Opportunities by Program into Style, Product, or Firm.
  - Found under menu item 'Opportunity.' Select the desired Program to determine your best Opportunity.

Take Advantage of These Key Functionalities

- **Proposal / Pipeline Review**
  - Follow up with new advisors who are putting your products in front of clients.
  - Found under the menu item 'Proposals (Pop Up).' Select 'Proposals Grid' in top left menu.
  - Data is updated on a daily basis; you can check the status on your proposals and assets daily.
- **Daily Sales**
  - Be aware of the new and existing producers; take action with a call or thank you note.
  - Ability to see sales and redemptions by product, firm, and advisor.
  - Found under menu item 'My Business Summary.' Select 'Daily Sales & Redemptions (Pop Up).'
- **All Advisors Using Envestnet**
  - Utilize to identify the advisors within firms where you have large opportunity.
  - See assets and flows by security type, style, and firm segment across all firms on Envestnet's platform.
  - Found under menu item 'Envestnet Totals (Pop Up).'

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