

Leveraging the Optimize Center of Excellence for DataOps to solve business-critical problems outside sales compensation

THE CHALLENGE

A leading US wealth management advisory firm had been using Optimize for sales compensation for two years and the stakeholders were happy with the outcomes. Outside sales compensation, however, the CEO and board were facing broader business-critical problems: **They needed to identify avenues for scalable growth amid a challenging business environment and customer skepticism.**

THE REALIZATION



Their existing Optimize solution was an integrated, validated, and cleansed record of truth about their customers, partners, advisors, and orders, which allowed them to easily leverage all their data further in making informed decisions about their revenue and cost model.

Discussing the challenge with the Optimize experts, their **leadership experienced a true “ah-ha” moment** when hearing that what they had was **much more than just a compensation system.**

The company took their partnership with Optimize one step further and enlisted the Center of Excellence (COE) for no-code DataOps to help facilitate the discovery of business purposes for their existing data and use the Optimize Platform Service to deploy, enrich, and supplement it with additional data sources. This enabled them to quickly develop applications that provide valuable insights to guide their business decisions, such as:

- Customer and partner segmentation;
- Investment retention rates;
- Customer acquisition trends and acceleration or deceleration rates;
- Prescriptive analytics about at-risk customers or add-on investments.

THE VALUE

Being able to repurpose the most accurate enterprise data opened **a new world of possibilities for the wealth management company.** Their Optimize solution already served as the record of truth for the entire organization. Leveraging the **Optimize COE for no-code DataOps**, the customer was able to find new avenues for scalable business growth and to better understand and prioritize their valued customer and partner needs.

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