



# Convergence Likely to Outsource (LTO)

*Predictive sales intelligence for in-house fund administration opportunities*

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## Product Description

- Likely to Outsource identifies investment advisers that are statistically more likely to move existing internally administered funds to a third-party administrator. The model demonstrates a 93% accuracy rate and combines in-house fund detection, observed outsourcing behavior, and adviser-specific business intelligence to help clients engage before an RFP forms.

## Product Benefits

- **Creates a First-Mover Advantage:** identifies advisers with in-house funds that are more likely to move those relationships externally.
- **Improves Sales Efficiency:** replaces broad prospecting with a prioritized universe and adviser-specific rationale for outreach.
- **Frames the Market Opportunity:** the source materials project 5,000 outsourced in-house funds from 2026 through 2030, representing \$2.4 trillion in assets under administration and \$1.2 billion in administration revenue.

## Product Features

- **In-House Fund Detection:** identifies existing and new funds supported internally across the Knowledge Center fund universe.
- **Predictive Outsourcing Analytics:** ranks advisers using characteristics observed in managers that previously moved funds to an external administrator.
- **LTO Adviser Intelligence:** provides operating facts that support conversations about burden reduction, scalability, controls, and internal constraints.

## Primary Use Cases and Delivery

- **Primary Users:** fund administrator sales, strategy, marketing, relationship management, and sales operations teams.
- **Common Use Cases:** outsourcing campaigns, in-house relationship monitoring, RFP pre-positioning, and adviser-specific account planning.
- **Commercial Impact:** the source materials estimate that winning five funds per year at a minimum fee of \$65,000 per fund creates a 12.8x ROI.