



Convergence Likely to Diversify (LTD)

Predictive sales intelligence for service provider diversification

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Product Description

- Likely to Diversify identifies advisers and private funds with characteristics consistent with adding another service provider. The model demonstrates a 90% accuracy level and monitors operational, regulatory, fund, client, relationship, and business complexity indicators to give sales and relationship teams an earlier view of potential diversification opportunities.

Product Benefits

- **Creates a First-Mover Advantage:** helps clients identify managers statistically more likely to add an administrator, auditor, prime broker, custodian, or other provider.
- **Improves Account Prioritization:** focuses outreach on managers whose operating profile aligns with broader diversification behavior.
- **Frames the Market Opportunity:** the source materials estimate that each one percentage point of share captured over five years represents approximately \$21 million of a \$2.1 billion opportunity.

Product Features

- **Model Coverage:** analyzes managers that use one or more providers and ranks the likelihood of an additional provider relationship.
- **Time-Series Comparability:** builds manager profiles and compares pre-diversification characteristics with the broader market.
- **Workflow-Ready Intelligence:** delivers market behavior analysis, relationship context, quality controls, and client-configured data fields, formats, and cadence.

Primary Use Cases and Delivery

- **Primary Users:** fund administrator sales, relationship management, strategy, marketing, and sales operations teams.
- **Common Use Cases:** diversification campaigns, provider relationship expansion, account planning, and evidence-based manager outreach.
- **Client Action:** approach managers with objective business intelligence and position the client as a logical additional provider.