



Convergence Product Roadmap

Service opportunity intelligence across the asset manager ecosystem

July 2026

Product Description

- Product Roadmap helps service providers identify when an adviser or fund shows observable demand for specific products and services. The product converts adviser, UMG, fund, ownership, lifecycle, valuation, financing, and service-matrix signals into a practical opportunity roadmap that explains the trigger, business relevance, supporting evidence, and service category to prioritize.

Product Benefits

- **Prioritizes Data-Backed Outreach:** helps sales and advisory teams focus on managers with observable product or service demand.
- **Reduces Fragmented Research:** consolidates manager and fund indicators into a structured opportunity and next-action view.
- **Supports Broader Account Planning:** connects valuation, financing, fund services, compliance, managed services, tax, assurance, and advisory opportunities.

Product Features

- **Service Opportunity Matrix:** links products and services to buyer segments, signal questions, and relevant business conditions.
- **Manager-Level Trigger Detection:** identifies opportunity flags using manager, fund, ownership, lifecycle, valuation, financing, and relationship data.
- **Opportunity Roadmap Output:** provides demand scores, active triggers, evidence sources, timing, urgency, and recommended next actions.

Primary Use Cases and Delivery

- **Primary Users:** accounting and advisory firms, valuation providers, fund administrators, lenders, prime brokers, consultants, compliance firms, and client teams.
- **Common Use Cases:** account planning, service cross-sell, target-specific reports, valuation or lending opportunity identification, and next-best-action workflows.
- **Delivery:** Knowledge Center intelligence, target lists, client-ready reports, and workflow-ready opportunity data.

To Learn More About Product Roadmap Contact:

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