

ManagerSolutions

Advanced Dashboards

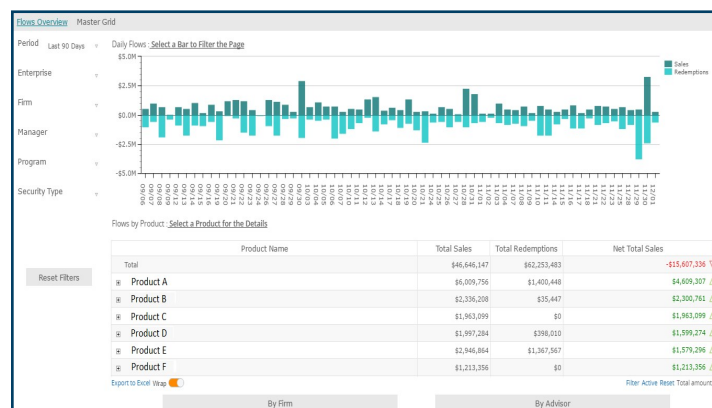
Advanced Analytics is an add on to the base Manager Portal.

We created the Advanced Dashboards on the Manager Portal for firms that are focused on growing their business. With the Advanced Dashboards, you have daily insight into your sales and redemptions and can gain unprecedented understanding of your opportunities for each of your product types. This deeper, more detailed view of your firm will allow you to quickly see how you stack up against the rest of the Envestnet ecosystem, and more importantly, show you what you need to do to lead the pack.

Advanced Dashboards

All Basic Dashboards Plus:

- Daily Sales and Redemptions
- Advanced Advisor Analytics
- Sales and Redemptions by Account (CRD)
- Advanced Opportunity, including FSP, ETF, and Funds
- Robust Fee Analysis
- Assets, Availability, and Fees
- Competitive Performance



What Can You Do?

- Get Daily Sales and Redemptions to Improve Sales Follow Up
- See How You Stack up to Competitors
- Set Competitive Product Pricing
- See Who is on Envestnet Platform
- Get These Dashboards in Salesforce
- Upload, store, and share your marketing content with firms on the platform

Key Users

- Executives
- Heads of Distribution
- Territory / National Managers
- Product Managers
- Key Account Managers


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Further Information

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