

OPTIMAL DATA FROM SFS HELPS ASSET MANAGERS ACHIEVE DATA ACCURACY AND RELIABILITY

Improved Data Quality for Asset Manager's Decision-making and AI

LARKSPUR, CA, UNITED STATES, October 15, 2024 /EINPresswire.com/ -- [SFS](#), a fintech leader in sales reporting and data analytics for the asset management industry, provides a competitive edge for asset management firms with its [Optimal Data](#) service.



SFS' Optimal Data service eliminates inaccuracies, gaps, and inconsistencies that can arise when integrating data from multiple custodial platforms and transforms raw, unfiltered data into actionable insights. SFS' Optimal Data service is particularly vital for asset managers dealing with vast amounts of contacts, sales transactions and asset position information flowing from various custodians.

A typical industry issue is that sales and asset data that is delivered to firms from multiple disparate sources is often incomplete making it impossible in some cases to tie the sales and asset data back to specific firms, branch/offices, reps/advisors, and accounts. Optimal Data resolves this issue by cleaning both sales and asset data and by streamlining the data cleaning process to ensure that only accurate contact, sales, and asset data powers a firm's reporting and analysis systems. Optimal Data can minimize costly mistakes and give sales and marketing teams confidence in the data to make better informed decisions based on timely, accurate, reliable information.

"Data accuracy is crucial in making the right decisions," said Nicole Callies, SFS Director of Sales and Account Management, "With Optimal Data, our clients can trust their numbers, which is a game-changer in how they approach their sales and marketing efforts. Accurate and reliable data is foundational for driving sales, identifying key market trends, and ultimately growing assets under management."

Optimal Data also integrates seamlessly into SFS' [MARS](#) Distribution Data warehouse platform,

providing asset managers with the ability to manage and analyze all of their contact, product, account, sales, and asset data within one unified system. SFS' MARS platform with the Optimal Data service provides asset managers with a comprehensive view of their sales performance and asset trends.

SFS' clients have seen significant improvements in sales analysis, advisor targeting, and operational efficiency with the Optimal Data service. Working with clean, reliable data improves sales and marketing effectiveness, optimizes their strategies, hones in on key opportunities, and provides cross-selling insights. Optimal Data also provides firms with the ability to spot emerging trends and outliers that would otherwise go unnoticed, including firms at risk of redeeming significant assets.

"The value of data is only as good as its accuracy," added Nicole Callies. "By using Optimal Data, our clients can eliminate data discrepancies and ensure that their reporting truly reflects the state of their business. This level of precision allows them to act faster and more decisively in a highly competitive market."

As data continues to play an ever-growing role in financial services decision-making and AI, Optimal Data ensures that asset management firms have timely and accurate data, setting the stage for even greater success and growth.

About SFS MARS

SFS MARS is a fintech leader in sales reporting and data management for asset management firms. With a suite of advanced tools, including the Optimal Data service, SFS enables firms to optimize their sales and marketing strategies, ensure data accuracy, and gain deep insights into their market performance. Trusted by asset managers across the industry, SFS continues to innovate and provide cutting-edge solutions for the evolving financial landscape.

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