POWERLYTICS ACCELERATES LEAD GENERATION WITH TRUEWEALTH

Learn how SoftServe and Powerlytics developed a lead generation platform to meet growth goals

P Powerlytics

soft**serve**

Financial advisors and institutions are constantly striving to deliver personalized services with efficiency, yet traditional lead generation tools fall short, relying on outdated or incomplete data. This inefficiency not only prolongs sales cycles but also inflates the cost of client acquisition, making the quest for high-potential clients a costly and time-consuming challenge.
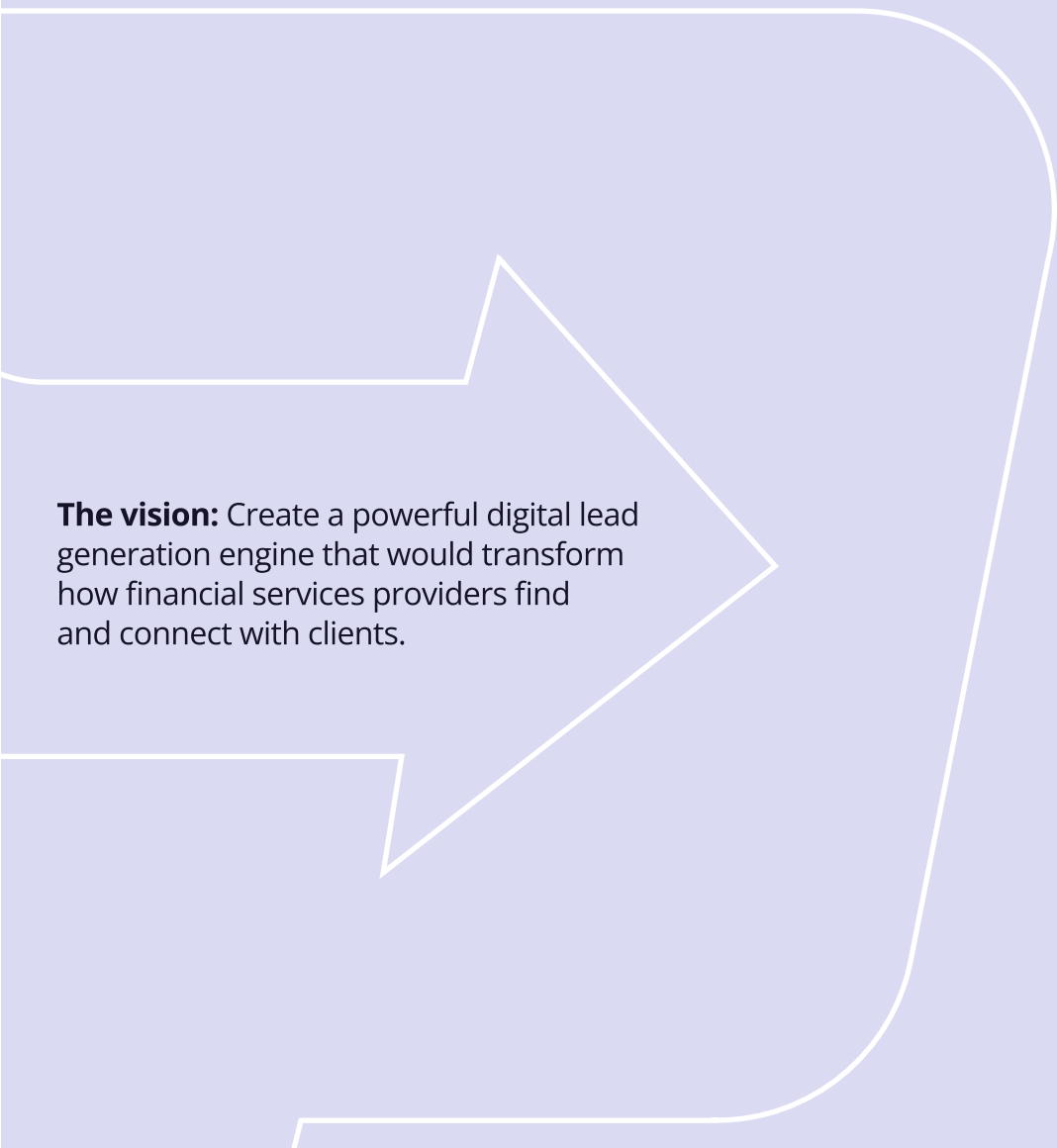
The **TrueWealth** platform revamps the way financial advisors and institutions generate leads. By utilizing Powerlytics' rich financial data assets, TrueWealth streamlines processes and empowers financial professionals to engage more effectively with their ideal prospects.

Improve data-driven lead generation

Powerlytics is a leading provider of comprehensive business and consumer financial data for banks, credit unions, insurance, and asset and wealth management institutions. Seeking to expand its product portfolio and explore new revenue streams, Powerlytics wanted to develop a new, innovative lead generation platform that would fully leverage its rich financial data assets.

Traditional lead generation tools often fall short — relying on outdated, incomplete, or superficial data — which makes identifying and reaching high-potential clients a costly and time-consuming process. Recognizing this challenge, Powerlytics aimed to meet the market's growing demand for accurate, data-driven lead qualification. Their objective was to streamline long sales cycles, reduce client acquisition costs, and ultimately empower financial professionals to engage more effectively with ideal prospects.

The vision: Create a powerful digital lead generation engine that would transform how financial services providers find and connect with clients.

Create a lead generation pipeline tailored to financial institutions

Powerlytics turned to SoftServe to bring the concept of a modernized lead generation platform, **TrueWealth**, from idea to reality.

SoftServe supported the full product lifecycle, including:

Product ideation
and strategic concept
development

End-to-end UX
and product design
tailored to the
TrueWealth audience

Technical
development

SoftServe designed the platform around a detailed analysis of the target market's lead generation challenges, aligning product features with the unique needs of financial planners and institutions.

At the same time, the technical solution was built to support Powerlytics' growth goals and integrate seamlessly with its existing technology environment, identifying new monetization opportunities for its data.

Optimize targeting and data-driven insights

TrueWealth is a game-changer for lead generation. It empowers financial planners, advisors, credit unions, and banks to:

- Build highly targeted, data-rich marketing lists
- Shorten sales cycles and improve conversion rates
- Lower the cost of client acquisition

These features enable financial institutions to move beyond basic targeting and toward unlocking strategic engagement with high-value prospects.

The platform offers several standout features that enable financial institutions to move beyond basic targeting and toward unlocking strategic engagement with high-value prospects. TrueWealth features:

- **Precision lead targeting**: Users can define location-based lead lists using a wide range of financial filters that take advantage of Powerlytics' extensive dataset to identify and target leads. This includes total investable assets — broken down into retirement vs. non-retirement, interest-bearing vs. equity-related — and more.
- **Custom scoring and segmentation**: Recognizing the importance of demographics such as income, age, and gender, TrueWealth provides a unique scoring mechanism. This allows users to prioritize leads based on how closely they match an ideal client profile, making list distribution more strategic and actionable.
- **Regional market insights**: Users can access granular market data for selected regions, including:
  - Average investable assets by type
  - Income levels
  - Geographic wealth distribution via interactive maps
- **Advanced financial intelligence**: Leveraging Powerlytics' proprietary datasets, the platform offers deep insights into several
  - Historical income trends
  - Comparisons across states
  - Demographics such as employment and marital status
  - Shifts in housing costs and more

Convert complex data into powerful value

In under six months, **SoftServe** and **Powerlytics** transformed a concept into a fully operational, digital product. The collaboration produced measurable business value, including:

- Launch of a new business model to monetize proprietary financial datasets
- A subscription-based platform appealing to both small advisors and large institutions
- A scalable digital product that broadens Powerlytics' market reach and relevance

A strategic partnership helps organizations take their bold ideas to market where they provide a tangible impact.

Let's talk about how SoftServe can help you achieve your business and growth goals by implementing next-generation solutions.

About SoftServe

SoftServe is a premier IT consulting and digital services provider. We expand the horizon of new technologies to solve today's complex business challenges and achieve meaningful outcomes for our clients. Our boundless curiosity drives us to explore and reimagine the art of the possible. Clients confidently rely on SoftServe to architect and execute mature and innovative capabilities, such as digital engineering, data and analytics, cloud, and AI/ML.

Our global reputation is gained from more than 30 years of experience delivering superior digital solutions at exceptional speed by top-tier engineering talent to enterprise industries, including high tech, financial services, healthcare, life sciences, retail, energy, and manufacturing.

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