Prospect Match: Turning Information Overload into Insight

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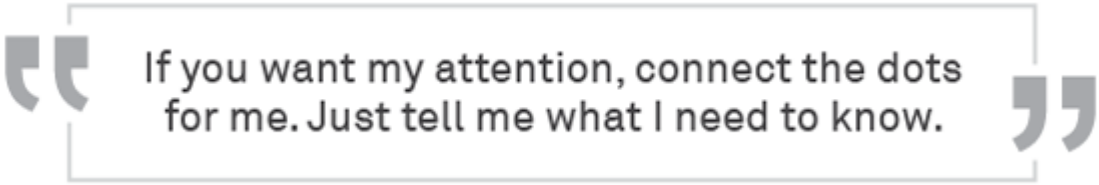
Information is constantly competing for attention, and attention is a scarce commodity. As we receive an increasing amount of information, our available attention to consume that information decreases. The email alerting you about this blog post is one of hundreds you may have received in only the last few hours. As you're reading this, you're also getting "pinged" on Teams, getting phone calls from clients and requests to please, if you would, turn now to an urgent matter of the highest importance.

If you're lucky enough to get five minutes back when a meeting ends early, you *might* have time to attend to all the work you still need to do. To select, filter and focus your attention on the key information that is most impactful to your job and attempt to ignore what isn't.

It's no different for our clients: relationship managers (RMs) at commercial banks. And certainly, no different for our clients' clients: business owners or CFOs who are just as inundated with information as they try to navigate high inflation, high interest rates and regulatory burdens.



Our Prospect Match clients are covering small to medium-sized businesses in the U.S. They're trying to keep their heads above water, servicing the banking needs of their existing clients and—with the limited additional bandwidth they have—finding new companies to work with. Given the excess of often irrelevant information about the companies whose business they're trying to win, our clients' mandate to us is clear: "If you want my attention, connect the dots for me. Just tell me what I need to know."

A Better Way for Commercial Banks

We developed Prospect Match with that mandate in mind. Our clients have limited bandwidth to spare. When prospecting for new companies, they want us to focus on what is impactful about each company:

- Which banks are already being used by this company?
- Are those banks weak or strong?
- Will this company help my bank to grow revenue or deposits?
- Is this a company that is ready to make a change in banks?
- If they are ready to make a change, what do I talk to them about so I can capture *their* attention?

In the past, RMs have struggled to find these key points. They had multiple Excel spreadsheets open. Visited countless websites. Tried to get value from publicly available data that was unstructured and opaque. Stared at a screen for hours trying to understand what, if anything, the underlying 1s and 0s were trying to tell them. There was too much information and not enough of it was meaningful. “Can no one come up with a better way?” they asked.

Our answer is to provide our clients with difference-making information and to show that information on screen in a way that makes sense. To sift through thousands of data points and highlight what matters so that our clients don’t need to moonlight as data analysts to understand it. We identify and aggregate the best data sources. We’re building and deploying the models and analytics to analyze and enhance that data. We’ll separate the signal from the noise. And we’ll serve up actionable information so that our clients can do their jobs better.

When we get right to the point, we can win their attention against the barrage of information they receive each day, and we don’t need to hold their attention for long to make an impact. If we can also give them five minutes of their time back—all the better.

Coalition Greenwich SME Analytics Director Brad Anderson is the author of this publication.

Click here for more information on Prospect Match.

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