

Customer 360

Know Your Customer and Gain Customer Insights with Fenris Data

Increase upselling, cross-selling success and reduce the cost of customer acquisition

When financial and wealth advisors, agents, and sales representatives reach out to customers, they often know only the customer's name, address and current product owned. Reaching out to prospects, they know even less. Fenris can help make these outreach conversations significantly more productive without time-consuming research.

Customer 360 turns a name and address into a detailed profile, providing rich insights that replace questionnaires with discussions about the products that best meet the customer's needs in the moment. Consider how conversations would progress with advance knowledge of:

- Wealth and retirement status
- Marital status
- Home ownership
- Household members

This information can be delivered directly to a CRM system to round out existing customer entries or injected in real time into a sales workflow. Companies can also use this intelligence for customer segmentation, marketing, and next best action programs.

Fenris uses robust APIs that deliver data in real time, matching names and addresses to the millions of individuals in our curated, regularly updated database. Integrating these data flows with current systems can typically be completed quickly and easily.

Match to over

255 million adults

130 million households

500+ data points



fenrisd.com/signup

hello@fenrisdigital.com

Customer 360

47+ Data Points of People and Households

Primary Named Insured

Full Name
Date of Birth
Age
Gender
Marital Status
Household Member Status
Address
Homeowner Status
Length of Residence
Occupation Class

Financial Information

Net Worth Range
Wealth Resources
Investment Resources
Liquid Resources
Short-term Liability
Mortgage Data
Home Equity Loan
Home Equity Data

Household Characteristics

Number of Generations
Generation Segment
Number of Adults
Presence of Children
Number of Children
Age Range of Children
Hobbies

Household Members (each)

Name
Date of Birth
Age
Gender
Marital Status

Contact us to identify your best customer

Connect