



MOBILE APP GIVES LINCOLN FINANCIAL GROUP WHOLESALERS NEAR REAL-TIME INSIGHTS

Lincoln Financial Group (NYSE: LNC) is a Fortune 250 company that acts as an intermediary between financial advisors and individual investors. The company provides Americans with advice and solutions to help them take charge of their financial lives with confidence. Lincoln Financial Group reports over \$275 billion in assets under management and supports over 17 million customers with expertise in four core business areas: life insurance, annuities, retirement planning, and group protection.

Wholesalers needed easier, faster access to financial data.

Lincoln Financial Group acts as a wholesaler in the financial services field, meaning they provide financial advisors with products to offer to individual investors. Before MicroStrategy, wholesalers had to print binders full of Word and Excel documents in preparation for their meetings with financial advisors. The data in those binders had to be manually manipulated by analysts within the company—a time-consuming process. To better support its wholesalers, Lincoln Financial Group wanted to build a data warehouse to store and provide access to all of their territory data.

Lincoln Financial Group used MicroStrategy to create an award-winning app.

During development, another business need became apparent: wholesalers needed seamless data access from one application. This contributed to the development of Lincoln Financial Group's award-winning application, Territory Visualizer. This easy-to-use iPad app provides over 700 external and internal wholesalers and support personnel with a comprehensive, updated view of their territories. It integrates sales data, compensation data, producer profiles, territory opportunity data, and key metrics into a single app. Wholesalers gained a competitive advantage by spending less time gathering information and more time driving business. The app "puts intelligence in the hands of wholesalers—increasing their productivity, enabling them to be closer to the customer, and creating better customer experiences," according to the Chief Marketing Officer of Annuity Solutions for Lincoln Financial Distributor and Lincoln Financial Network.



Company

Lincoln Financial Group

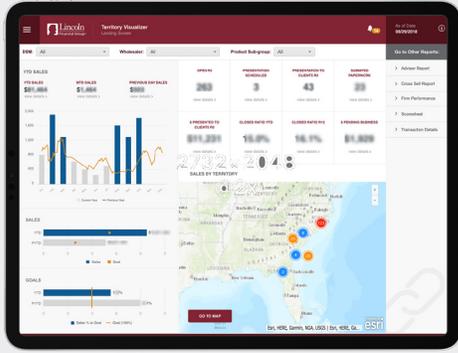
Applications

Mobile

MicroStrategy on AWS

"Territory Visualizer puts intelligence in the hands of wholesalers—increasing their productivity, enabling them to be closer to the customer, and creating better customer experiences"

—CMO of Annuity Solutions
Lincoln Financial Group



Before MicroStrategy

- Time-consuming data collection process
- No access to recently updated data
- Dependence on static, printed material

BI Goals

- Reduce time spent gathering data
- Easy app customization
- Real-time, updated data available anywhere

After MicroStrategy

- Access to real-time data in a single mobile application
- Wholesalers know where to focus efforts
- Scales quickly and easily

Territory Visualizer has a range of unique features, such as Geospatial Territory Analysis and sales and performance metrics, allowing teams to focus their efforts intelligently. Push notifications send embedded congratulatory videos from the Senior Vice President and Head of Annuity Sales at Lincoln Financial Group and advisor indicators that use artificial intelligence to predict which financial advisors to contact. The app also has write-back capabilities so wholesalers can accomplish scenario analysis in front of customers. The app serves more than just wholesalers; Territory Visualizer is intrinsically involved in Lincoln Financial Group's processes, and objects originally created for the app are now used for executive management reporting. The app's results were so impactful that the Insured Retirement Institute (IRI) awarded Lincoln Financial Group with its 2016 Marketing Innovation Award.

MicroStrategy on AWS has improved wholesaler performance.

A customer since 2014, Lincoln Financial Group was an early cloud adopter. The company migrated its mobile and web services to the cloud via Amazon Web Services (AWS). Employees anywhere, in the field or at home offices, can now leverage cloud capabilities to better serve their customers and easily scale operations. MicroStrategy on AWS allowed the company to deploy its Territory Visualizer app quickly and cost-effectively. MicroStrategy's Cloud team brings expertise to help keep the cloud running smoothly, so Lincoln Financial Group can leverage AWS to improve their reporting and analytics without needing MicroStrategy expertise within their company.

Ready to learn more?

Speak with an expert and request a demo.

Call Us: 703-848-8600

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