

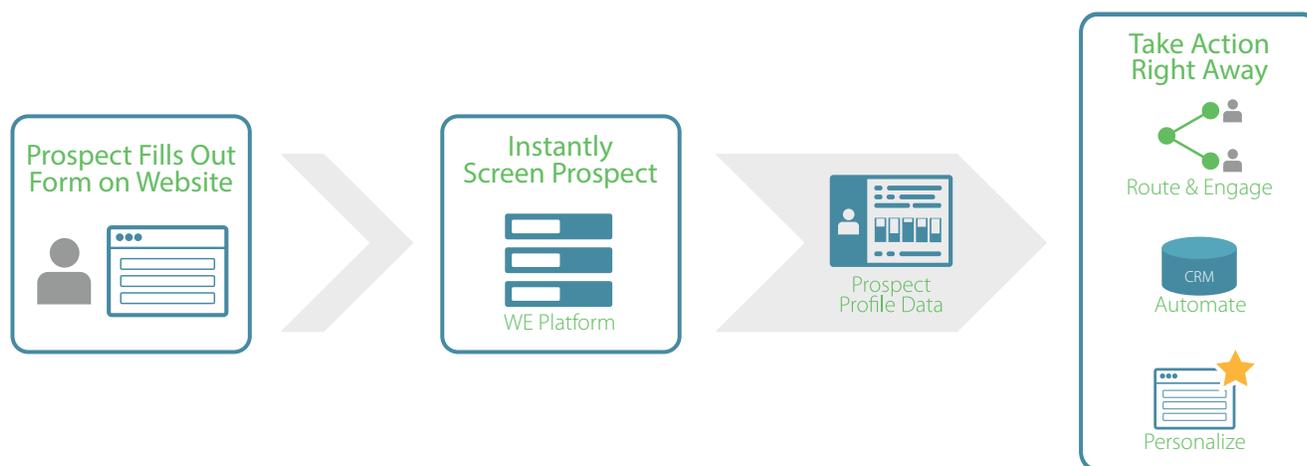
WE On Demand Screening



- + **Instantly screen** prospects on your website so you can take action right away.
- + **Automate and streamline** your lead scoring and outreach processes.
- + **Personalize** the experience of your prospects to maximize potential opportunities.

Overview

On Demand Screening is a solution that integrates your registration or purchase processes with the WealthEngine platform to instantly screen your prospects as they interact with your site.



How It Works

On Demand Screening is a turnkey solution. We deliver an integration between your online website and our platform to perform real-time wealth screenings as prospects interact with your site.

- » Our team works with you and your team to design an integration and data process tailored for your organization.
- » WE implement the technical integration that connects your system to ours via the WE API.
- » WE work with you to roll out the system to end-users.
- » Our team transfers all knowledge to your technical staff.

Deployment timeframes vary from 2-8 weeks, depending on the specifics of the project and complexity of your integration.

Benefits



Never Miss an Opportunity

Every day, high-potential prospects visit your website and interact with your company. The problem is that you may not know it until much later. When prospects interact with your online presence, they are engaged. That engagement can fade as time passes so it's important to take action right away to nurture that relationship. Our On Demand Screening solution empowers you with the necessary real-time insights in order to maximize the potential of high-capacity prospects.



Automation and Streamlining

The On Demand Screening enables you to route prospects directly from your web forms into your CRM fully populated with valuable wealth data. From there, you can trigger a number of automated actions, such as including particular prospects in email nurture campaigns, routing prospects to specific sales representatives for further action, or customizing their online experience – all based on rules and segmentation you define.



Personalize the Buyer Experience

You invest in providing a personalized experience for high-capacity prospects. With On Demand Screening, you can start the process sooner. As new prospects are in the process of interacting with your website, you can discover their wealth capacity instantly. This enables you to personalize the rest of their online experience from that point forward. For example, depending on their wealth, you may change their website experience on-the-fly.

Solution Options

	ON DEMAND STANDARD			CUSTOM
	Small	Medium	Large	
Maximum Screened Prospect Records Delivered via API	5K	20K	50K	>50K
Integration Support	✓	✓	✓	✓
Integration Services	Services support to deploy the solution including: design, develop, testing, roll-out, and knowledge transfer for an integration that captures data from one client registration or purchase form, calls the WE API, and delivers profile results into one client, database or system.			

Get Started Quickly

To get started with our On Demand Screening call 800.933.4446 or visit wealthengine.com today.



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