

The Sales Agent.

Intelligent Distribution Infrastructure

Most distribution budgets are spent on preparation, not selling. That changes now.

70–80%

of the distribution week is preparation.
The Sales Agent was built to fix that.

THE DISTRIBUTION PROBLEM

Your best
salespeople
spend most of
the week not
selling.

INSTEAD THEY ARE:

- › Researching client portfolios
- › Piecing together market themes
- › Building generic pitch decks
- › Searching disconnected data tools
- › Re-doing work done last quarter

The result: 20–30% of the week is actual selling.

HEARD FROM THE FIELD

**With the right data,
you can walk into
Monday morning and
say: here is where
the demand is.
That changes
everything.**

HEAD OF SALES · GLOBAL ASSET MANAGER

20+ years in asset management distribution

This is the conversation that shaped the Sales Agent.

Six Steps. One Workflow.

From first signal to first meeting. Fully integrated.

01

Market Intelligence

Monitors thousands of advisors globally. Cross-geography consistency confirms a trend is real, not regional noise.

02

Flow Validation

Cross-references sentiment against real flow data (Morningstar, Lipper, EFR). Separates what advisors say from what they do.

03

Strategy ID

Capital market analytics identify which strategies are positioned for now, backed by both sentiment and flow evidence.

04

Client Targeting

Validated strategies mapped to individual advisors, scored by vehicle preference, philosophy and relationship tier.

05

Comms Profiling

Quantitative psycholinguistic analysis profiles how each firm communicates. Pitch built in their voice, not yours.

06

Presentation Output

Presentation-ready materials for each target. Talking points, positioning, narrative: ready before the week begins.

Knowing who to call is half the challenge.

Knowing how to talk to them is the other half.

The Sales Agent profiles every target firm using quantitative psycholinguistic analysis: the science of how language reveals how people think, decide and communicate.

THE FAILURE MODE THIS SOLVES:

Right product. Right timing. Wrong pitch. The room goes cold.

THE PROFILE REVEALS:

Communication style

Professorial · Authoritative · Reassuring

Analytical depth

How much complexity they trust

Client language

The vocabulary they use with their own clients

Investment philosophy

Inferred from language alone

Target client type

Who they are trying to reach

The pitch is then built in their voice. No translation gap. No one-size-fits-all deck.

Product roadmaps built on anecdotal sales feedback are expensive bets. The Sales Agent replaces opinion with evidence: before you commit to development.

HEAD OF PRODUCT · BOUTIQUE ASSET MANAGER

15+ years in asset management product development

What the Sales Agent stops:

- ✗ Launching without validated demand
- ✓ See real flows before committing to development

- ✗ Roadmaps built on the loudest voice
- ✓ Replace anecdote with cross-market evidence

- ✗ Misaligned positioning at launch
- ✓ Know which segment, vehicle and message before go-live

WHAT ELSE IS OUT THERE, AND WHY IT FALLS SHORT

Most sales intelligence tools

CRM · data subscriptions · flow databases

- ✗ Insights live in silos, no workflow
- ✗ Built for analysts, not sales teams
- ✗ Shows information, generates no action
- ✗ Generic output for all clients
- ✗ Data only, no experience layer

Three Horizons Sales Agent

Built end-to-end for distribution

- ✓ Trend to pitch in one integrated system
- ✓ Built by distribution professionals
- ✓ Generates output: decks, talking points, targets
- ✓ Client-specific profiling for every target
- ✓ Decades of distribution expertise embedded

The tools that failed were built by people who understood technology but not distribution. Every step of the Sales Agent exists because it was needed in the field, not designed in.

Ready to see it?

The Sales Agent is not a brochure.
It is a live, working system.

One hour. The output speaks for itself.

1 Hour

to replicate a
week of research

800+

advisors profiled
globally

End-to-end

trend to pitch,
one workflow

Request a Demonstration

We work with a small number of firms where the fit is right.

threehorizonscapital.com

The Sales Agent is one of three integrated modules available through the Three Horizons platform.