

Accelerate Sales & Unlock Revenue at Bank of America

A leading global investment bank accelerated client engagement and data access with actionable intelligence



Executive Summary

Bank of America's Trading Foreign Exchange desk faced a familiar growth challenge: valuable data existed, but it was slow, fragmented, and limiting revenue potential beyond their top tier of clients. Peraison helped change the story by enabling faster, trusted access to insights and introducing predictive client intelligence that empowered sales teams to act decisively. The result was sharper client targeting, early visibility of churn risk, and a meaningful expansion into untapped high value segments. This engagement demonstrates how outcome focused data solutions can directly translate into accelerated sales performance and sustained competitive advantage.

The Challenge

At Bank of America's Trading Foreign Exchange (TFX) desk, siloed data and slow reporting created significant barriers to performance:

- Sales teams struggled to target high-potential clients beyond their top 20.
- Data lake queries took over 30 seconds, often timing out and delaying critical decisions for sales, trading, and management teams.
- There was a pressing need for predictive client insights and reliable, fast data access to drive revenue growth in a highly competitive market.

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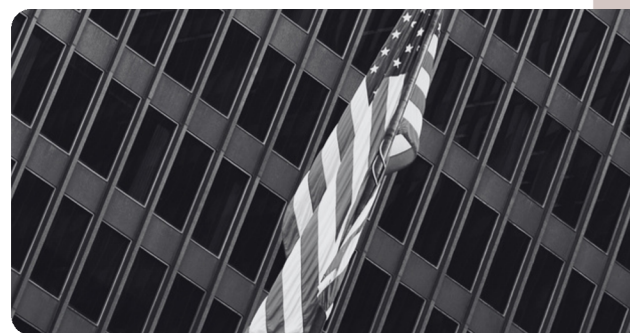
Our Solution

Peraison partnered closely with BoA TFX to deliver two high-impact solutions tailored to immediate business needs:

- **Client Behaviour Analysis:** We developed a pragmatic behaviour model using trading, demographic, and sales activity data. Clustering algorithms segmented clients effectively, flagging attrition risks and generating prioritised "next-best-action" lists to enable proactive outreach.
- **Data Lake Accelerator:** We introduced near-term performance fixes, a lightweight GUI for direct lake queries, and role-based dashboards featuring auditable metrics. The solution is fully stack-agnostic and compliant with enterprise standards.

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Transformative Results

The outcomes have empowered teams to act with speed and confidence using trusted data:

- Early churn warnings paired with clear recommendation rationales.
- Instant answers delivered through a single, unified view of key metrics.
- Expanded sales focus to untapped high-value client segments, unlocking significant new revenue opportunities.
- Complete elimination of reporting frustrations, enabling swift and informed decisions across all desks.

Scalable Across the Enterprise

This proven approach extends seamlessly to other areas including Equities, Rates, Credit, Commodities, Treasury, Risk, and Finance. Peraison's partner-led, outcome-first methodology ensures embedded controls and regulatory compliance, with rapid deployment to production.

Bank of America TFX now maintains a clear lead through precise, data-driven decision-making.