

# THE MUTUAL FUND CROSS-SELL LADDER

## How CDP Maps Investor Readiness to the Right Product

A Customer Data Platform collects and unifies data from every source website, mobile app, CRM, and transactions into a single real-time investor profile. The CDP engine continuously scores and segments investors so the right product finds them at the right moment.



### POWER YOUR CROSS-SELL LADDER WITH LEMNISK’S CDP

Real-time investor segmentation · Personalized triggers across channels  
 Plug-and-play AMC integrations

[Book a Demo](#)

