



ASSET MANAGEMENT | FINANCIAL SERVICES

Resale for Asset Management Battlecard

AI Data Cloud for Financial Services | Target: Asset Managers, Hedge Funds, Pension Funds | Key Buyer: CIO · Head of Data · COO

The 30-Second Elevator Pitch

Asset managers today face a ‘data divide’—they are struggling with siloed, stale data that slows down investment decisions and increases risk. The AI Data Cloud for Financial Services is a single global platform that eliminates data silos and manual file transfers — no copying, no moving data.

By using Snowflake, industry leaders like BlackRock and State Street can access live market data in near real time, run complex risk models without slowing down daily operations, and reduce data costs by up to 50%. It turns data from an operational burden into a competitive advantage to generate higher returns (Alpha) and improve client service.

Top 3 Use Cases

Three key areas where Snowflake delivers immediate value for asset managers:

- **Quantitative Research & Investment Analytics** — Accelerate time to ‘Alpha’; quants get immediate access to all proprietary and third-party data to build, test and deploy investment models faster using Python
- **ESG Data Strategy** — Source, integrate and analyze ESG data without building custom ETL pipelines; combine portfolio data with third-party ESG scores from the Snowflake Marketplace
- **Regulatory Reporting** — Automate complex reporting (for example, MiFID II and Solvency II); governed single source of data that streamlines audits and reduces manual compliance effort

Customer Proof Points

State Street: 50% reduction in TCO; reduced data sharing time from months to minutes (4,000x improvement).

BlackRock: Built the “Aladdin Data Cloud” on Snowflake — unified investment data view powering automated investment pipelines.

Fidelity: Eliminated silos by moving 100+ data warehouses to Snowflake, powering better digital experiences and Customer 360.

Goldman Sachs: Launched “Legend” — a data platform on Snowflake giving clients secure access to their holdings data.

Key Differentiators: Why we Win

Single Data Platform — Competitors force you to copy data into different silos for different teams (Quants vs. Reporting). Snowflake keeps a single copy of data that everyone accesses, ensuring one version of the truth.

Secure Data Sharing — Eliminates the need to copy or move files via FTP/API. Share live data with custodians, partners, or clients in near real time. Result: Reduced latency and operational risk.

Unlimited Concurrency — In legacy systems, if IT runs a big report, the system slows down for traders. Snowflake spins up separate virtual warehouses for each team so performance stays consistent.

Snowflake Marketplace — Functions like an “App Store” for financial data. Asset managers can access live data from providers like FactSet, MSCI and S&P Global without waiting for IT to build connections.

The “HOOK”: 3 Questions to Ask

Ask these to uncover challenges around speed, complexity and data access.

1. “How long does it take your quant researchers to access the data they need to backtest a new investment strategy?” **Why ask:** Identifies the pain of “stale or incomplete data” and elongated pipelines. If they say days or weeks, Snowflake can reduce this to minutes.
2. “Are you struggling to integrate ESG or alternative data sources into your portfolio views?” **Why ask:** Highlights the difficulty of ingesting third-party data. Snowflake Marketplace provides near-instant access to datasets (like S&P Global or FactSet) without building ETL pipelines.
3. “Do you experience system slowdowns when running heavy risk models at the same time as your regulatory reporting?” **Why ask:** Exposes “resource contention.” Snowflake separates compute resources so heavy calculations never block critical reporting tasks.

Objection Handling

Objection: “Moving our data is too risky and expensive.” **Response:** “You don’t have to ‘rip and replace’ everything at once. You can start by moving a specific workload—like ESG reporting or Quant Research—to see immediate value. Firms like Fidelity moved incrementally to eliminate silos without business disruption.”

Objection: “We are happy with our legacy database (for example, Oracle or SQL Server).”

Response: “Legacy systems require you to provision hardware for your ‘peak’ usage, which is



expensive and inefficient. Snowflake scales up and down automatically, meaning you only pay for what you use. State Street reduced their Total Cost of Ownership (TCO) by 50% by switching.”

Objection: “Security is our top priority; we can’t share sensitive client data.” **Response:** “Snowflake is built for financial services with enterprise-grade governance. Snowflake’s Data Clean Rooms let you collaborate on data without ever exposing the underlying PII. This is trusted by institutions like Goldman Sachs.”

Seller Do’s and Don’ts

Do’s

- **Focus on Business Outcomes:** Talk about “Time to Alpha,” “Investor Experience,” and “Operational Efficiency” rather than just storage.
- **Highlight the Ecosystem:** Mention that their partners (custodians, market data providers) are likely already on Snowflake, making integration near-instant.

Don’ts

- **Ignore the Quant/Data Science teams.** They are key influencers. Mention Snowflake’s support for Python (Snowpark) which helps them build models faster.
- **Forget Governance: Asset managers** are heavily regulated. Always emphasize Snowflake’s built-in governance, lineage and security capabilities.

Cold Email & Phone Script

Cold Email

Subject: Accelerating your time-to-alpha (and cutting data costs)

Hi [Prospect Name], asset managers today are under immense pressure to generate alpha, yet research teams are stuck waiting days or weeks for data. Snowflake helps firms eliminate manual file transfers that slow down research — State Street: 4,000x faster data sharing, 50% TCO reduction; BlackRock: unified investment pipelines; Fidelity: 100+ siloed warehouses consolidated. Open to a brief call? — [Your Name]

Phone Script

“Hi [Prospect Name], this is [Name] from [Reseller]. I’m calling because many of the asset managers we work with are struggling to get data to their quant teams fast enough to actually impact investment decisions. We’re working with Snowflake to help firms eliminate the manual file transfers that slow down research. For example, State Street used this platform to cut the time it takes to share data from months down to minutes. I’d love to briefly share how they are helping



firms access live ESG and market data in near real time — no complex pipelines to build. Do you have five minutes this Thursday?"

Full Email Template

Subject: Accelerating your time-to-alpha (and cutting data costs)

Hi [Prospect Name],

Asset managers today are under immense pressure to generate alpha, yet many research teams are stuck waiting days or weeks for the data they need to backtest strategies.

We are partnering with Snowflake to help firms like BlackRock and State Street modernize their data strategy. The Snowflake AI Data Cloud for Financial Services allows you to:

- **Eliminate Data Silos:** Access a single source of truth for portfolio, risk and market data without manual ETL.
- **Accelerate Research:** Give your quants immediate access to live data to build and test models faster.
- **Lower TCO:** Reduce data infrastructure costs by up to 50% via a unified platform.

Are you open to a brief conversation about how you can integrate new data sources (like ESG or alternative data) in minutes rather than months?

Best, [Name]

Full Phone Script (Cold Call)

"Hi [Prospect Name], this is [Name] from [Reseller]. I'm calling because many of the asset managers we work with are struggling to get data to their quant teams fast enough to actually impact investment decisions.

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