



Making e-protection business easier for advisers

Automation analysis for e-protection business

- Adviser Forum have conducted an **independent analysis** to identify how well **Intelliflo and Assureweb** can help advisers streamline the submission of **protection business online**.
- The analysis examines **how much information the two systems can pass onto each other and the provider e-application** so the adviser avoids having to re-key information.
- Reusing data already entered wherever possible is critical to **saving adviser time and avoiding errors**.



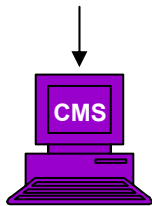
Automation achieved
100%

Automation achieved
@ @ @ @ @

Working harder

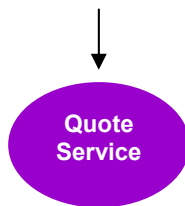
Adviser has to re-enter client and quote data into a fact find, quote service and e-application

Adviser types in basic client information in to their Client Management System (CMS)



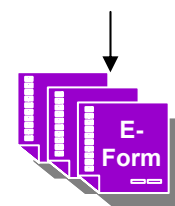
System 1

Adviser re-enters client data into quote service to obtain a quote



System 2

Adviser re-enters client and quote data into provider e-application



System 3

Result = adviser can end up typing the same information at least 3 times into multiple systems

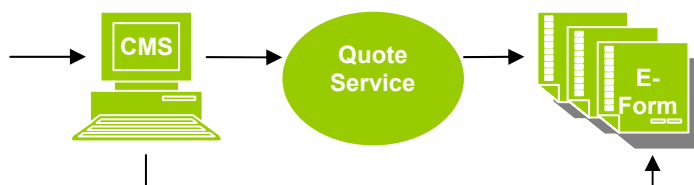
Working smarter

Adviser enters client details once and they are re-used over and over again

CMS and Quote service pass on data entered by the adviser to the provider e-application

System 1

Adviser types in client data into fact find in client management system (CMS)



Result = adviser types in data once and it get re-used over and over again saving valuable processing time

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Automation analysis for e-protection business-results

- Working with advisers Adviser Forum has identified items of client and quote information that Intelliflo and Assureweb should pass on automatically for protection applications, these items are listed below.
- Our testing has measured the extent to which the two systems move this data seamlessly into a provider e-application.
- When producing this independent analysis for Intelliflo and Assureweb the Legal & General e-application was used.
- The pie charts below identify how Intelliflo and Assureweb and Legal & General have performed.



Data moves across automatically

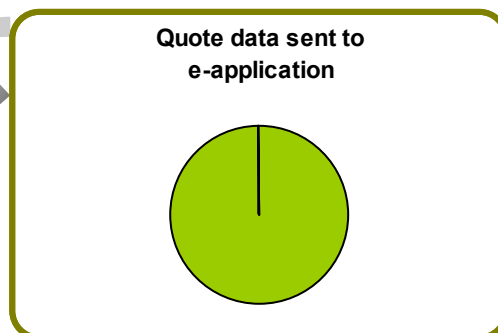


Data has to be re-keyed by adviser

Client name
Client date of birth
Gender
Number of applicants
Lives assured
Smoker indicator

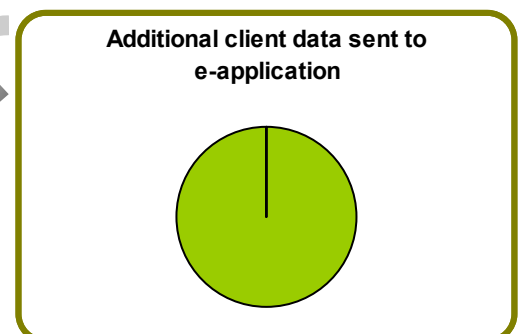


Sum assured
Term
Premium
Commission amount
Commission basis (indemnity)



Client name
Client date of birth
Gender
Number of applicants
Lives assured
Smoker indicator
Firm ID (name / SIB / network)
Firm address inc.postcode
Adviser's email
Adviser Reference
Client address

Bank name
Bank address
Bank postcode
Bank account number
Bank sort code
Doctor's name
Surgery name
Surgery address
Surgery telephone number
Employment status
Occupation type



Adviser Forum, 59-60 Russell Square, London WC1B 4HP
Web Site: www.adviserforum.org