



Making e-protection business easier for advisers

Automation analysis for e-protection business

- Adviser Forum have conducted an **independent analysis** to identify how well **Webline, Quay Software and Norwich Union** 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**.



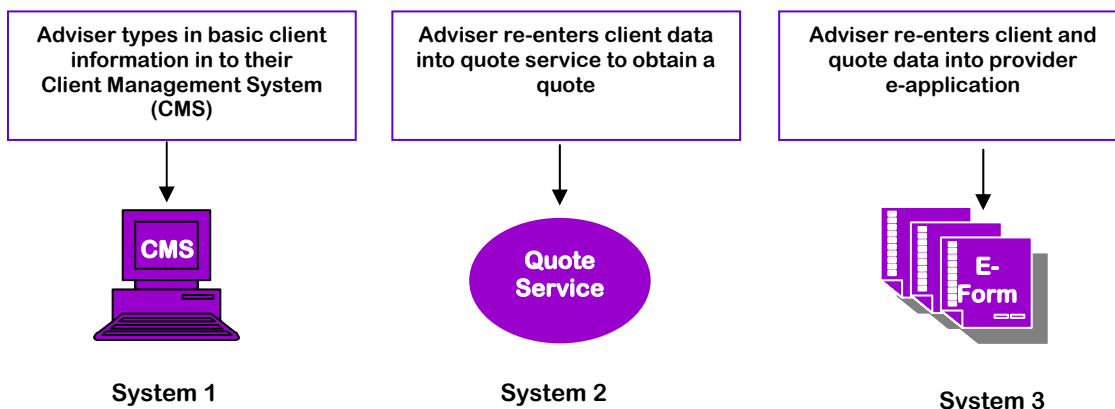
Automation Achieved **Rating achieved**

88%

@@@@@

Working harder

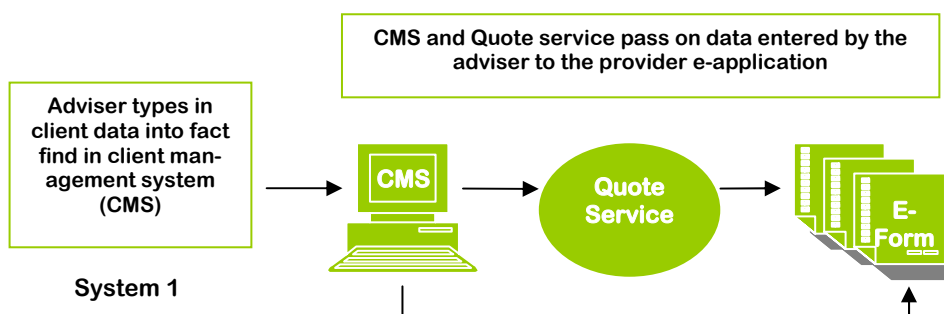
Adviser has to re-enter client and quote data into a fact find, quote service and e-application



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

Working smarter

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



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 **34 items of client and quote information** that **Portals and Client Management Software Providers** should pass on automatically for protection quotations and 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 of **Webline and Quay Software** the Norwich Union Term Assurance elect application was used
- The **pie charts below** identify how Webline, Quay Software and Norwich Union have performed



Data moves across automatically

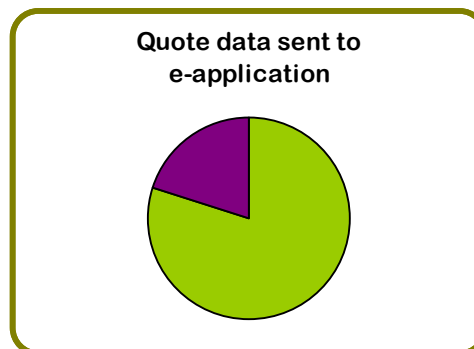


Data has to be re-keyed by adviser

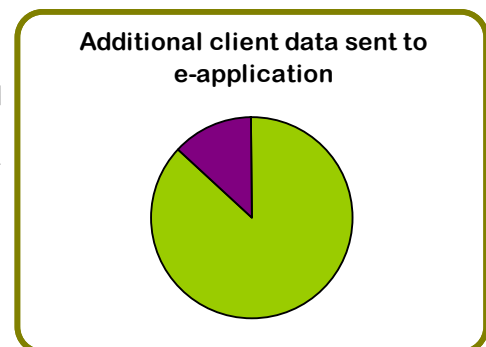
Client name
Client date of birth
Gender
Number of applicants
Lives assured
Smoker indicator



Sum assured
Term
Premium
Commission amount
Commission basis (indemnity, non indemnity)



Client name	Client address
Client date of birth	Bank name
Gender	Bank address
Number of applicants	Bank postcode
Lives assured	Bank account number
Smoker indicator	Bank sort code
Firm ID (name / SIB / network)	Doctor's name
Firm address including postcode	Surgery name
Firm email ID (adviser's email)	Surgery address
Adviser Reference	Surgery telephone number
	Employment status
	Occupation type



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