



Agenda

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- **Introductions**
- **Executive summary**
- **Actions and objectives**
- **CE and new contracts**
 - Providers to confirm how they represent Contract Enquiry policy formats within all e-messages they support for individual and group business
 - Discuss how CMS vendors can use this information to improve CE service for new contracts.
- **CE and managing service closure times**
 - What can be done to prevent advisers from triggering message requests when services are unavailable?
- **CE error and warning messages**
 - Providers to clarify which information they can send back within their error and warning messages.
 - Parties to identify good practices and put forward recommendations that can improve user experience of the CE service and reduce the number of persistent errors.
- **E-new business – reporting back:**
 - Understand Current capabilities (who is doing what and with whom?).
 - Discuss adviser adoption of services – why are advisers not making more of what is available?
- **Data security:**
 - Brief overview of what the FSA expects from advisers on the subject of due diligence and 3rd party system suppliers.
- **AOB**