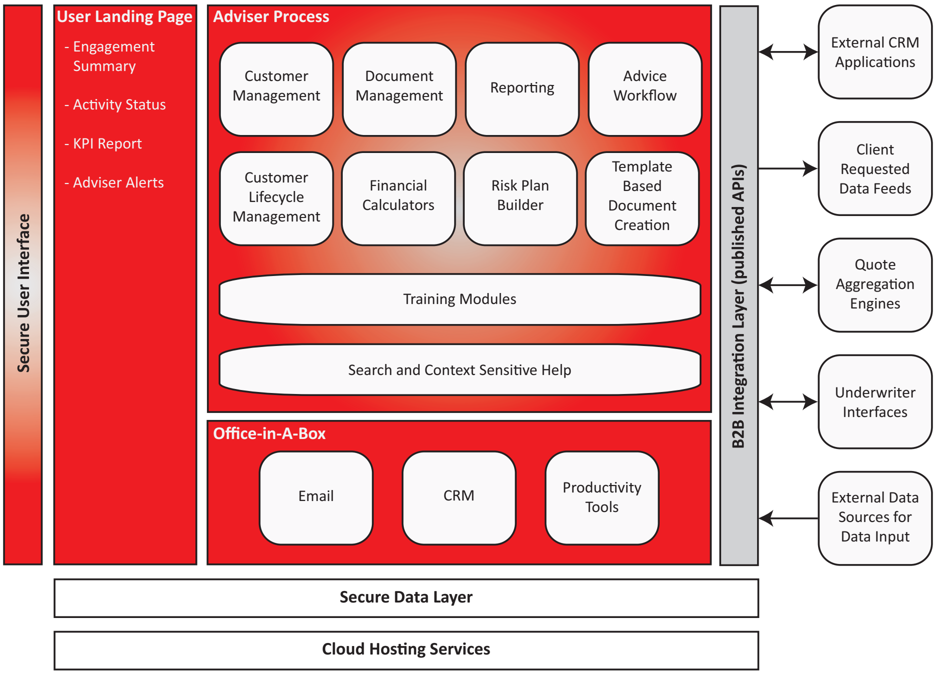
Technology



- ***Secure User Interface***
  A browser based interface that is contemporary, fast and easy to use. Robust user management functionality manages authentication and authorisation.

- ***User Landing Page***
  When a user logs on they reach a landing page from where they can view key information and navigate to specific engagements and customer details. The dashboard provides a single view of
  - Customer engagement summary and progress
  - Activity status alerts
  - KPI reporting
  - Adviser alerts when specific activities are close to or past due dates.

- ***Customer Management***
  Provides all the processes to establish customer engagements and the associated customer details and relationships as a starting point for the customer lifecycle management process.

- ***Document Management***
  Enables the user to store all generated documents, uploaded documents and reference documents and templates related to individual customers.

- ***Advice Workflow***
  The embedded workflow enforces the process by ensuring that users can only complete the next defined step when the previous step has been completed satisfactorily. This is an activity/event based workflow process rather than a time based process.

- ***Customer Lifecycle Management***
  This process creates and manages time driven activity schedules and notifications e.g. renewals, annual reviews, claims, policy schedules, policy alterations etc. An adviser will also be alerted when in progress activities are taking longer than expected to allow for follow up.

- ***Reporting***
  The system generates reports to enable a client to measure and manage key metrics across a range of core data related to specific applications including adviser activity, sales conversion ratios, pipeline timelines and administration activity.

- ***Search and Context Sensitive Help***
  The system enables easy searching for information and includes context sensitive help for users.

- ***Financial Calculators***
  The financial calculators analyse and produce the financial risk calculations for business and personal risk advice and they produce some key output content for the final risk plan document.

- ***Risk Plan Builder***
  The Risk Plan Builder takes specific templates already built into the system and outputs from the financial calculators to produce a risk plan document describing the consumers customer's financial risks and the solution recommendations. The final document is constructed in a PDF format.

- ***Template Based Document Creation***
  Enables the risk management plan document to be produced with an organisation's own branding.