

Enterprise Wide Sales Support Solution

Financial Services management face new challenges almost every day. Can you afford to wait for the monthly sales figures to see who has made their target? Do you understand why so many sales cases fail quality checks? Can you demonstrate adherence to your Training and Competence scheme and to TCF principles?

Imagine being able to respond to complex challenges with immediate, qualified and informed solutions. Imagine a staff tightly focussed and aligned to your business goals. Imagine directing strategy by working with up to the minute figures, with time to focus on people and drive improvement.

And imagine achieving all this while minimising your compliance risks and satisfying regulation.

Imagine working with **Insight**.

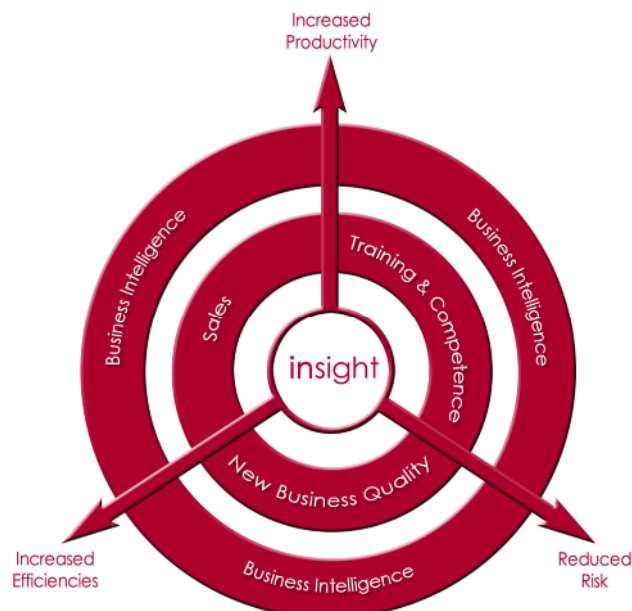
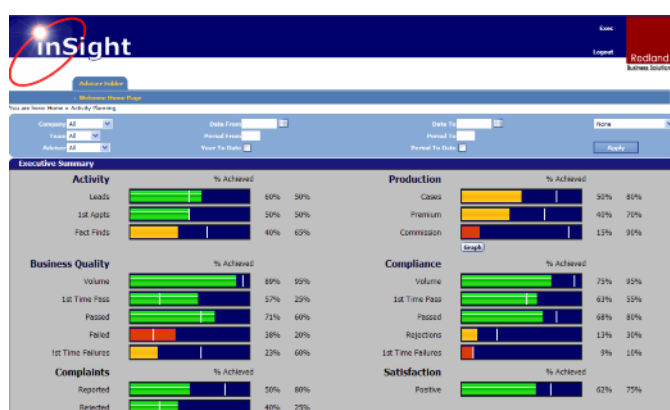
Informed decision making across the enterprise

Insight is an enterprise wide business intelligence and process support tool for the distribution of regulated Life and Pension, Mortgage, and Insurance products.

Insight collects data, collates information and analyses the entire sales cycle from end to end.

The business intelligence (BI) dashboard eliminates data collection delays, eases analysis and helps align staff to strategic objectives, delivering improved corporate performance. The dashboard is a window on the business. It summarises the entire sales process with full pipeline analysis, T&C visibility, compliance overview and TCF indicators.

Track sales targets, flag deviations to policy, show progress on regulation and business goals. Take informed decisions, and apply evidence based tuning to business processes. Model and discover "what if" scenarios, based on live data.



Key benefits

► Increased productivity

Insight provides managers and advisers with the up to date, accurate information they need, when they need it. It gives managers the time to manage and advisers the time to work with clients making the whole enterprise more productive.

► Reduced risk

Demonstrate regulatory compliance with powerful reporting based on comprehensive risk based monitoring. Embeds compliance within key business processes.

► Reduced costs

Provides common access to data from multiple systems and ensuring that only at risk situations are investigated saving time and money.

► Minimal integration and reduced maintenance

Insight's standard integration services draw data from critical systems using established technology (.NET, SOA). Not just protecting existing investment but working along side existing key systems offering reliability, flexibility and protection of hard won skills and capability.

► Fair treatment for customers

Implement TCF principles and demonstrate your company's commitment to service and fair conduct.

Three core modules

At **Insight's** heart beats three core modules which collaborate as a complete system or provide customisable solutions for specific requirements.

Insight integrates with many common applications and Databases. Carefully researched products and finely tuned processes often need purpose built software. Redland Business Solutions deploys extensive financial services and technical experience to identify and create bespoke services.

Insight for Sales

Provides Sales managers with tools to help them achieve ambitious targets whilst reducing costs and minimising exposure to risk.

- ▶ League tables and at-a-glance productivity measurement
- ▶ Sales activity management tools
- ▶ Personal development plans
- ▶ Sales case submission support
- ▶ Pipeline tracking and salesperson risk ratings

Insight for Sales identifies employee development issues, sharpens focus on key performance and improves sales force motivation through superior communication.

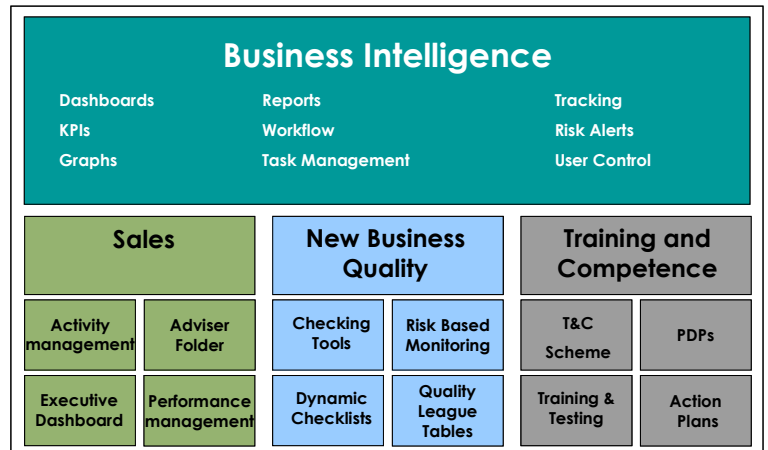
Insight for New Business Quality

Insight for New Business Quality supports the sales case functions of quality checking, compliance review, audit and complaints.

- ▶ Quality checking
- ▶ Risk based monitoring
- ▶ Compliance monitoring and review
- ▶ Audit and complaints
- ▶ Submission support with electronic pro-formas

With the real-time **Insight** dashboard, instantly discover how sales deviate from defined quality policies, and use evidence based tuning to improve business processes. **Insight** for New Business Quality helps develop best practice by proving regulatory, compliance and TCF credentials.

	Actuals	Target	Differences	% of Target	Target Ratio	Actual Rate
Lead	39	45	-6	87%		
1st Appointment	38	40	-2	95%	89%	97%
2nd Appointment	27	30	-3	90%	75%	71%
Policies Sold	43	60	-17	72%	2	1.59255
Average Points	9	20	-11	45%		
Total Points	421	400	21	105%		
Total PIC YTD	89500	0	89500	0%		
Policies on risk	43	60	-17	72%		
Policies off risk	0	5	-5		0%	0%
Quality Failures	4	40	0		67%	9%
Compliance Failures	0	40	1		67%	0%



Insight for Training and Competence

Paper files are rarely in the right place when needed, and sorting ad hoc documents to prove staff competence is never easy. With **Insight** for Training and Competence, your T&C policy is embedded in your business processes ensuring automatic and permanent control of compliance issues. Be certain your staff are competent and are appropriately trained to give financial advice.

- ▶ Bespoke business rules for your T&C Scheme
- ▶ Personal development plans
- ▶ Outstanding actions alerts
- ▶ T&C key performance indicators
- ▶ Qualify, create and schedule training courses and tests
- ▶ Book observations, one-to-ones and assessments

By defining activities based on staff competencies, at risk sales activities can be flagged before they become real problems, and training scheduled. Secure online access to T&C information means no more frantic file searching for that imminent one-to-one!

About Redland Business Solutions

Redland Business Solutions is a provider of specialised services, expertise and solutions to the financial services and mortgage industries. We are passionate about working with our clients to achieve real benefits in their organisations by delivering practical, value for money solutions.

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