



AXA Winterthur Wealth Management

**winterthur** : case study



## highlights

As part of an overall exercise to consolidate the new AXA Winterthur Wealth Management brand, AXA Wealth undertook a project to bring together the AXA Wealth and Winterthur IFA extranet sites onto a single platform. As part of this process they were keen to understand the best way to combine the two sites to maximise the benefits of each, as well as to look at improvements to their overall IFA extranet offering. To this end, AXA Wealth commissioned Focus Solutions, based on their extensive knowledge of extranet platforms and strong relationships with the IFA community, to conduct a consultancy exercise on their existing extranet services.

## objectives

- gain an independent and objective view of the strength and weaknesses of the current AXA and Winterthur extranet sites
- understand how to make the single extranet platform more attractive to advisers
- understand how to encourage more business to be submitted electronically via the new single extranet

## methodology

To achieve the aims of this project Focus Solutions undertook the following:

- filmed interviews with different IFA firms to ascertain in-depth, qualitative views from advisers in each of the segments being targeted by AXA Winterthur.
- a detailed consultancy report highlighting the strengths and weaknesses of the existing AXA and Winterthur extranet platforms based on user feedback and Focus' extensive extranet experience.
- a proof of concept to illustrate how AXA Winterthur could address the key issues raised by the interviewed advisers and those outlined in the consultancy report.

## benefits

- real user feedback on the strengths and weaknesses of each of the extranet sites
- clear priorities for AXA Winterthur's e-commerce roadmap for the next 12 months
- insight into how the AXA and Winterthur extranet sites compared to that of the competition
- overview of the latest online tools and functionality required by end users

we appointed Focus to complete an evaluation of our respective IFA extranet offerings to help get an independent view to feed into our overall ecommerce roadmap and priorities for the next 12 months. This proved to be a really useful exercise helping to position the shortcomings internally and the areas in which we needed to invest to drive more e-volumes and an enhanced customer service proposition. The final recommendation report was received very favourably by the key stakeholders within the group.

Laura Edmunds, Adviser Services Portfolio Manager, AXA Winterthur Wealth Management



**focus solutions group plc**

cranford house, kenilworth road, leamington spa, warwickshire, cv32 6rq, united kingdom

**t.** +44 (0)1926 468300 **f.** +44 (0)1926 468400 **w.** [focus-solutions.co.uk](http://focus-solutions.co.uk)

**AXA / WINTERTHUR\_v1.0**