



 **Lincoln** : case study
Financial Group®





Improving our service to intermediaries is key to Lincoln and we believe this solution provides time and efficiency benefits for our clients. We selected Focus' technology as it met our business requirements and priorities for a robust and flexible automated solution that would provide straight through processing and deliver an enhanced service to our customers.

David Willis, IT and Strategic Change Director from Lincoln Financial Group

overview

Intermediary extranet solution supporting advisers with generating bespoke illustrations online of pension products.

background

Lincoln Financial Group is the UK business name of Lincoln National (UK) PLC and its UK subsidiary companies. Lincoln National Corporation, the parent group, is listed as LNC on the New York Stock Exchange.

Lincoln in the UK is passionate about doing the best for its customers at or in retirement, by bringing to the market reliable and flexible solutions which enable a smooth transition through retirement, protecting and enhancing wealth to enjoy an income for life. Lincoln serves the needs of customers nationwide through financial advisers and is dedicated to building excellent customer service.

requirements

Following an initial consultancy contract with Lincoln Financial Group in 2006, Focus Solutions was awarded a contract for the development of an intermediary extranet service for their Lincoln i2Live products for the retirement planning market. The service will provide support for financial advisers selling and servicing financial services products.

Lincoln required a solution that would

- improve the adviser experience
- be simple and easy to use
- be easy to integrate into existing systems

solution

The intermediary solution developed by Focus enables Lincoln to provide advisers with an online browser based application, which showcases the product set and the ease of illustrating a fully flexible retirement plan. Through the Lincoln adviser website, www.lincoln-ifa.co.uk, advisers are able to generate bespoke illustrations online of pension products for their clients including i2Live Accumulator, i2Live Drawdown and i2Live Annuity.

The solution includes an extranet framework that utilises Focus' core components such as a case management facility, illustration data capture and integration to a pre-sales quotation engine provided by DSTiPAS (Pensions Actuarial Service). Future enhancements will improve the service for both the adviser and Lincoln internal administration, enabling them to track transfer payments, obtain valuations and re-assign cases electronically.

outcome

Focus' innovative front office solution has enabled Lincoln to take advantage of the changing retirement planning market in the UK, and has facilitated the development of closer relationships with their intermediaries through business process automation.



Focus is delighted to be recognised in the e-excellent SIPP, Drawdown and Mortgages - Ratings 2008 with the 'Best Newcomer – Stand Alone Drawdown' award as well as being accredited with an EE+ rating for Lincoln i2Live, Lincoln Financial Group's flexible retirement income solution.



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