



The financial services world is evolving, with consumers wanting their financial services organisation to provide them with choice and convenience and allow them to interact across a range of channels, such as branch, internet and mobile at any time and from any location. In addition organisations need to utilise a number of distribution routes in order to remain competitive.

In light of these industry factors you could be facing numerous issues and opportunities such as how to:

- provide a variety of client experiences and journeys from a single platform
- achieve a single view of your clients and their provisions
- implement a single, compliant sales process across multiple channels
- increase up and cross sales opportunities
- minimise the disparate systems required for different channels without compromising channel specific requirements

focus: 360° multi-channel distribution can support any channel, any sales process, any product and any advice model from a single platform, enabling you to deliver a flexible and engaging consumer experience.

“Many financial institutions are undertaking Multi-Channel Integration projects to create a single consistent customer experience, improve customer service and streamline channel as well as front-to-back-office processes.”

Data Integration Vendors for Banks: CDI or MCI? – June 2009, Gartner

what is **focus:360°** multi-channel distribution?

focus:360° multi-channel distribution is a regulated sales automation solution supporting multiple distribution channels across a range of financial products. It can support you with meeting over 26 client agendas for a range of audiences from mass market to Ultra / High Net Worth and across a variety of advice models from execution only to full independent advice. **focus:360°** multi-channel distribution transforms the experience you provide to your customers by allowing them to select the most appropriate channel and advice model for their needs.

The solution delivers all of our **focus:360°** channel content in one single, collaborative platform, allowing you the flexibility to expand to other distribution channels and products as required and future proof your distribution strategy.

supporting services

Implementing your chosen technology solution is only one aspect of embarking on a multi-channel distribution strategy. To ensure your proposition is successful you will also need to take into consideration your processes and people as well as minimising the risks associated with delivering such a solution.

In addition to **focus:360°** multi-channel distribution we can provide a range of services which encompass all aspects of a multi-channel project including:

- **a tried and trusted delivery approach** – through our 15 years of experience we can support the implementation of your project from business case justification through to effective roll out and adoption.
- **extensive domain knowledge** – our in-house industry experts can advise on best practice business processes and an effective operating model to meet your project's objectives.
- **innovative training capabilities** – we can assist you with maximising the use and adoption of your new technology through our technology training services as well as ensuring your staff are adequately trained to meet the regulatory and business needs of your organisation.



focus:360° multi-channel distribution provides a single client view

benefits of **focus:360°** multi-channel distribution

focus:360° multi-channel distribution can:

- support a range of client experiences from direct to consumer to a full financial review through:
 - pre-configured business content which can deliver anything from a simple, execution only protection transaction to a holistic wealth management case
 - multi-channel brand, process and collaboration capabilities
- provide a single view of your customers, including their provisions and risk through:
 - comprehensive data aggregation and data integration functionality
 - direct provider integration capability for valuation and service information¹
- increase up and cross selling of products and services through:
 - alert based client management
 - integrated lead management
 - cross-sales identification via goal / liability based planning
- recognise the type of user and alter the brand accordingly through a business process controller which can intelligently orchestrate a range of experiences across multiple channels
- future proof your ongoing distribution strategy through a flexible single platform which can expand to additional channels as required
- support new, emerging adviser propositions through the ability to devise a full range of remuneration and service models
- increase speed to market for new products through a configurable data capture presentation layer and a soft described business content and process model architecture
- reduce IT costs through streamlined IT architecture and rationalisation of disparate systems

¹ subject to provider

“following a very extensive review process, we have concluded that **focus:360** provides us with the best solution for our advisory technology needs, now and in the immediate future.”

Mike McGaughrin, Group Services Director, Tenet

multi-channel distribution platform



underlying technology features

- browser based
- available online and offline
- database agnostic
- Service Oriented Architecture
- XML based tool-kit for easy configuration
- multi-currency / multi-language

focus:360° multi-channel distribution delivers a flexible and engaging customer experience

about focus

Focus Solutions is a leading provider of software and consultancy services to the financial services industry. We enable our clients to automate the delivery of products and services to their customers across multiple distribution channels in a rapid and efficient manner.

We achieve this through a combination of:

- agile software products
- in-depth expertise in the regulated financial services market
- proven project delivery
- innovative training capabilities

Our market leading products support a variety of sales automation projects ranging from multi-channel implementations to individual point of sale solutions. Designed to be flexible to respond to the ever changing regulated financial services market, the **focus:360°** product suite has been chosen by leading bancassurers, product providers, mortgage lenders, wealth managers and major distributor firms.

why work with focus?

- specialised consulting services which provide access to a wealth of industry knowledge, experience and insight through real-world practitioners.
- powerful training and competency capabilities, including classroom training, online training and online assessment.
- proven project delivery with over 75 complex multi-channel implementation projects with several integration points successfully completed for a blue chip client base.
- experience of supporting systems that are utilised by 1000s of internal staff across multiple locations.
- industry thought leaders who publish whitepapers on latest market trends, comment in trade publications and speak at high profile events.



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