

multi-channel distribution functional data sheet

focus:360° multi-channel distribution is a regulated sales automation solution supporting multiple distribution channels across a full range of financial products. The solution is a combination of all our other versions of focus:360°, allowing organisations to operate all channels from a single electronic trading platform. focus:360° multi-channel distribution has the flexibility to expand to other distribution channels and products as required.

product features

- support multiple channels to market
 - wealth management
 - mass market
 - consumer call centre
 - consumer internet
 - unlimited additional channels as required
 - collaborative client management
 - alerts
 - lead management
 - centralised compliance & risk management
 - centralised management information
 - centralised performance & revenue data
 - single client view
 - shared client activity
 - identify client preferences
 - provide tailored client service
 - identify client value
 - client details & provision summary
 - contact management
 - outlook integration
 - portfolio valuation
 - financial summary
 - objective performance review
 - sector analysis
 - financial history
 - Financial Express price feeds & x-ray feeds
 - business opportunity generation
 - lead management
 - wealth alert generation
 - advice/sales process
 - document generation
 - agenda setting
 - client objective management
 - personal fact find
 - corporate fact find
- trust fact find
- charities fact find
- case document management
- central document library
- attitude to risk questionnaire
- asset allocation
- investment needs analysis
- pensions needs analysis
- protection needs analysis
- IHT needs analysis
- model portfolio selection
- portfolio rebalancing
- quote management
- Assureweb TPI quote integration
- Assureweb Ape quote integration
- needs and recommendation process
- anti-money laundering capture
- suitability letter generation
- case submission
- case notes management
- holistic 'what if' based financial planning
- client relationship management
 - alerts generation
 - mail merge export
 - client information portal support
 - annual report
 - sector analysis
 - client holding review
- distribution management tools
 - case checking
 - training & competency
 - TestMeOnline content
 - new business processing
 - management information

task management
remuneration management
commission EDI feeds
agency management
adviser & introducer payments management

technology

- web browser based .NET2 solution
- scalable SOA architecture
- enterprise security
- SQL server 2005 database platform
- on/offline deployment

non functional features

- highly configurable
- flexible look & feel
- autosave