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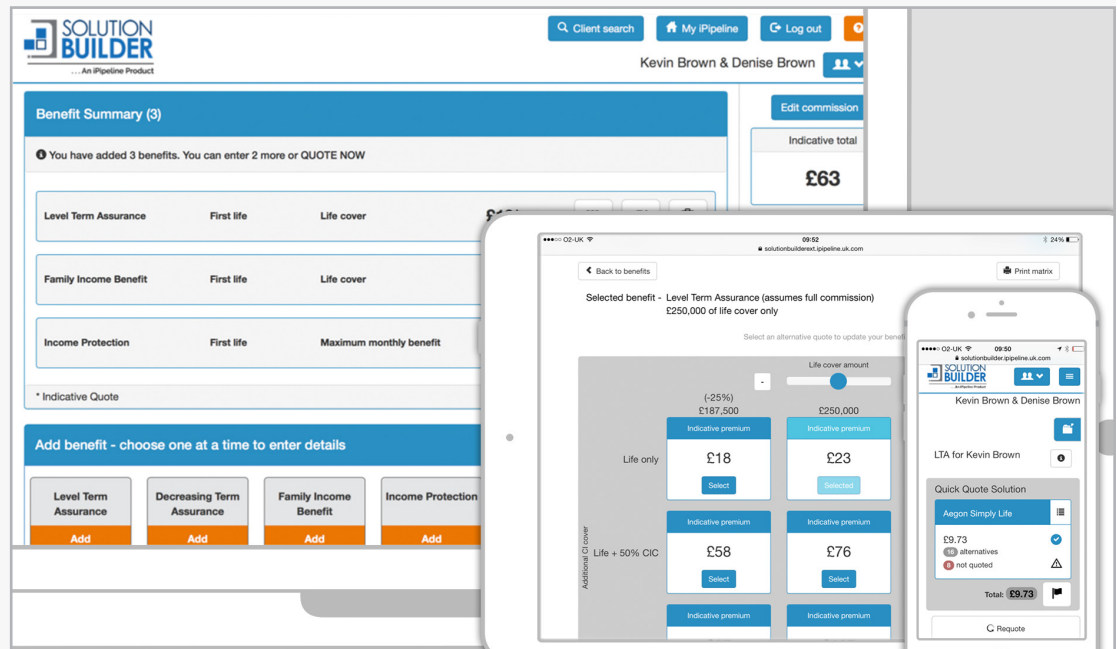
Time-saving compared to quoting the same case on a traditional portal

100%

Increase in number of income protection policies sold

30%

Improvement in straight-through processing



SOLUTIONBUILDER®

A CLIENT-CENTRIC SOLUTION FOR COMPARING COMPLEX PROTECTION NEEDS

RESEARCH & SELL PROTECTION

SolutionBuilder - iPipeline's award winning client centric, research, quote and apply solution - is becoming the industry standard for protection sourcing.

Many customers have complex protection needs and quote research is a critical part of the business and sales process when selling Life, Critical Illness, Business Protection, Whole of Life or Income Protection insurance. With SolutionBuilder, advisers have increased efficiency in the research of suitable products and the associated cost. It provides advisers with a faster and more efficient way of reviewing a client's protection needs and how they can be packaged together. This includes both multi-benefit and single-benefit product comparisons, encouraging up-sell and cross-sell, to accelerate the selling of protection.

EASILY COMPARE PRODUCT QUOTES

Advisers rarely produce one comparison for clients. Frequently, an adviser will tweak the quote, input data, change the sum assured, vary the term or add/remove waiver of premium. After these normal adjustments, advisers are left with multiple comparison results based on varying input data that cannot easily be compared side-by-side.

SolutionBuilder easily compares multi-benefit products against single-benefit products in a single view. It will display up to eight comparisons side-by-side, allowing advisers to view the information clearly in a single view with the ability to edit on the fly, all in a clean, responsive UI.

CROSS-SELL & UP-SELL ON-THE-GO

SolutionBuilder is configurable and optimised for use on tablets, enabling advisers to engage their clients during the protection advice process. Advisers can flag and add product options to folders, allowing them to easily adjust their product recommendations based on client needs.

Integration with XRAE also enables advisers to produce indicative underwriting results in real time, for life assurance and critical illness, helping to manage client expectations upfront.

AN AWARD WINNING SOLUTION



PRODUCT CAPABILITIES AND BENEFITS

Research, quote and compare a client's protection needs across multiple product sets including Life, Critical Illness, Business Protection, Whole of Life and Income Protection Insurance.

View a number of different solutions including multi-benefit and single-benefit products, in a single view.

View a range of indicative premiums from a single set of inputs, helping to set client expectations earlier in the process without having to run multiple quotes.

Quickly start a new quote or sort, search and retrieve existing client quotes.

Client history is stored for future reference, including previously quoted information which can be re-used for further client options.

Quickly increase and decrease cover options and view the impact on premiums, along with visually demonstrating to clients the different options available.

Integrated with iPipeline's indicative underwriting solution, XRAE.

'Flag' preferred products throughout the research process so that they can be easily returned to and applied for.

Quote data is held for 90 days allowing easy access to return to and review quote options.

Generate a personalised Risk & Mortgage Protection Report to highlight to clients the importance of protection.

Download Key Features, Illustrations and Comparison Reports, in one folder, for single and combination solutions in just 15 seconds.

Quote and client data is pre-populated into provider extranets when you click 'Apply'.

Faster more efficient solution allowing advisers to easily review their clients' protection needs and quickly find the right solution.

Streamlined application process with LifeQuote integration available to reduce time spent on admin.

Aligns well to the requirements of call-centre operators who need to have quick access to a wide range of cover options and costs, in order to react to the requirements of the customer in real-time.

Clean, clear, responsive UI, optimized for tablets, to reflect the changing nature of how advisers want to use technology to improve business efficiencies.

Integrated with a number of industry CRMs, offering a straight-through process, pre-populating applications with client data: Mortgage Brain's The Key, 360Dotnet's 360 Lifecycle, Intelliflo's Intelligent Office, Twenty7Tec's Mortgage Source, Time4Advice's CURO and Bluecoat's Finplan.

NEW - Ability to retrieve a quote and apply for select General Insurance products.