

Maximise the relationship with your Intermediary Customers

Single view of your Intermediaries

Due to multiple interactions with brokers across the business do you have broker information held in a variety of different systems i.e onboarding/risk, Business Development, Marketing, support etc and find it difficult to pull together a single view of the broker and your interactions with them?

Onboarding brokers

Are lots of your due diligence checks and initial communications with brokers done manually. Do you have check points in place to ensure all checks are complete before doing business with brokers. Are controls in place to ensure consistency between staff on checks being completed?

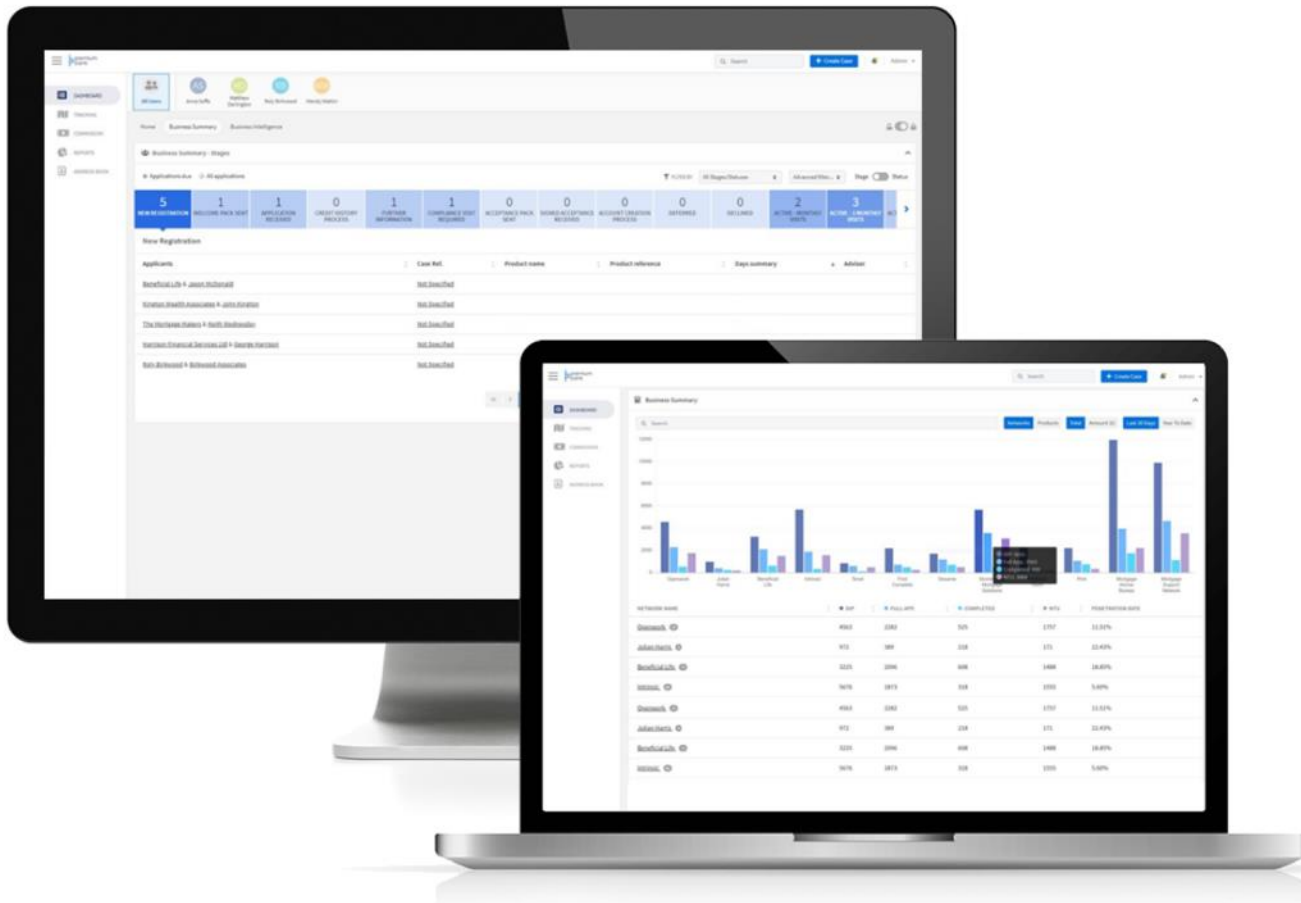
Targeted activity

Do you have all the key information to hand in one place for segmentation and targeting. Are you engaged with your most important customers?

Contingency

What happens when key staff are on holiday or off sick. Do you have arrangements in place to ensure their key activities can be handed over. What happens when a BDM leaves and the new BDM joins. How can they quickly get up to speed on your relationship with a broker to have a full picture and understanding of the previous interaction with the brokers they will manage?

Intermediary Manager



- **Full hierarchy reporting:** Giving full visibility of business levels at Network, Firm and Adviser level
- **Onboarding member firms:** Manage the onboarding of new firms and individuals through fully configurable workflows
- **Relationship Management:** Record all key details and important information for all intermediaries and partners
- **Business Intelligence:** Visual display of key metrics and KPIs with fully configurable BI widgets
- **Activity Management:** Automatic scheduling of visits in-line with service propositions
- **Security and Usability:** Protect your intermediary records with bank grade security for peace of mind and GDPR compliance



Broker ID - All the data you need in one place

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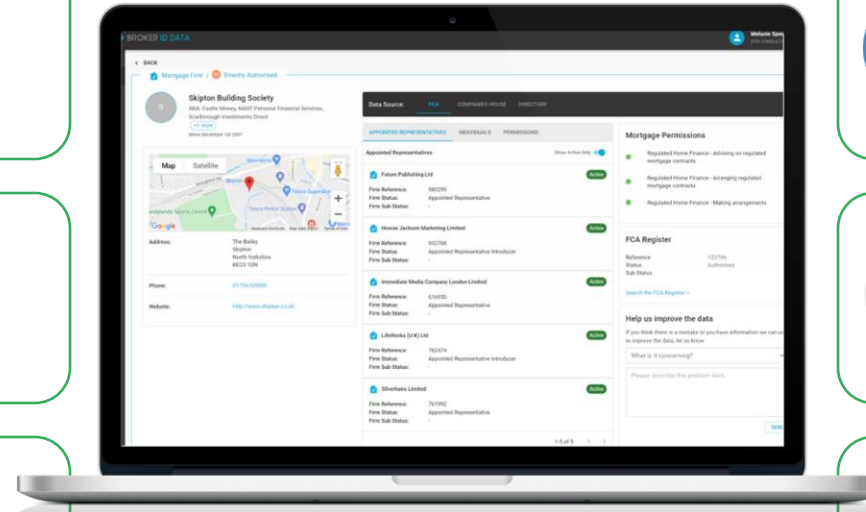
FCA data on business controllers and relationships of firms and individuals



FCA Individual Persons - Detailed individual data on approval status



Companies House data to understand your intermediaries' business footprint



Instant access to broker websites and social media channels presence



Credit Safe check – Conduct thorough due diligence

Coming Soon



Information Commissioner's Office - Ensure your brokers are GDPR compliant

Coming Soon

Access in-depth data on authorised firms and individuals from a single, easy-to-use platform

Who benefits from these solutions?

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As a single source of truth to ensure that everyone across the business can access the same enhanced data from a centralised location, to make more informed decisions

Trusted by



Next steps...

- Book a demonstration
<https://www.finova.tech/contact>
- Get instant access to BrokerID
- Go live with Intermediary Manager in less than 8 weeks
- For any questions or further information please contact:



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