

eData Services: Event Manager

For advisers only. Not for use with customers.

A guide to FRIENDS eServices

An 'event' is a change of status to your new business pipeline or existing book of business. Event Manager is an automated alert service that notifies you of such changes to your Friends Provident proposals and policies. This can be used to support your existing processes and systems, and even offers the potential for integration with your client management system.

How does it work?

how

New business tracking

Our new business system records the activity on all of your protection proposals that you have submitted through eSelect, our online underwriting system. It is designed to pick up on key events on the proposal's journey, starting with the submission of the application and culminating with the policy going live.

In the near future we will be extending the Event Manager service to cover further products.

Policy servicing

Our systems also record key events relating to activity on all of your Friends Provident policies (submitted both on and offline), alerting you to changes as they happen during the policy's lifecycle.

Event Manager for policy servicing events is currently available for all products on the following events:

- overdue premiums
- lapsed policies
- cancelled policies (including cancellations from inception).

The captured information is collated into a series of detailed reports. These can be set to run at a time to suit you on a daily, weekly or monthly basis.

We will send you an email when your report is ready to collect. When you click on the link provided in the email, you can log into the Friends Provident extranet and retrieve your data, supplied as a CSV (comma separated value) file that is easily displayed in an Excel spreadsheet.

data

How can I use the data?

Having new business and policy servicing event data at your fingertips will enable you to keep track of your pipeline business, commission streams and activities within your own back office records. You can use the data to reconcile commission and the status of business coming onto and leaving your books. It also enables you to keep clients informed when their application status changes, follow up on any outstanding information such as declarations or GP requests and identify any commission activity. Policy servicing event data can help you manage your client retention and take action as appropriate.

If you want to drill down further into individual cases or view correspondence trails, the pipeline tracking feature on the Friends Provident extranet provides you with the depth of information you need to do this quickly and easily.

What are the benefits?

- Update your own records in a single action with the data we provide to you.
- You'll only receive data when the status of outstanding applications, premiums or policies changes.
- Event Manager is a solution that can be used by any size of business.
- Keep abreast of all your outstanding applications and policies at a frequency that suits you.
- Spend less time chasing the progress of applications and more time with clients.
- Streamline your business processes and cut administrative effort.
- Have a greater awareness of the status of your book of business so you can take action to complete proposals or retain existing clients.

benefits

start

How do I get started?

To start taking advantage of our eData services, you'll firstly need to be a registered user of Friends Provident's online services.

- 1 Visit our website at www.friendsprovident.com/adviser/register. You can either choose to register with Unipass if you currently hold a Unipass certificate, or register without Unipass by completing our online registration form and choosing a login ID and password.
- 2 Visit our website at www.friendsprovident.com/adviser/eadoptionform to register your interest for the service, or alternatively you can email our eAdoption team at eadoption@friendsprovident.co.uk to request more information. The team can also offer you an eBusiness Review, where they'll work with you to make sure you're getting the most out of your eBusiness systems.

Friends Provident Life and Pensions Limited

Registered and Head Office: Pixham End, Dorking, Surrey RH4 1QA
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www.friendsprovident.com Telephone 0845 602 9189

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