



Power Apps



Power BI

Xpedition

FS Xcelerator

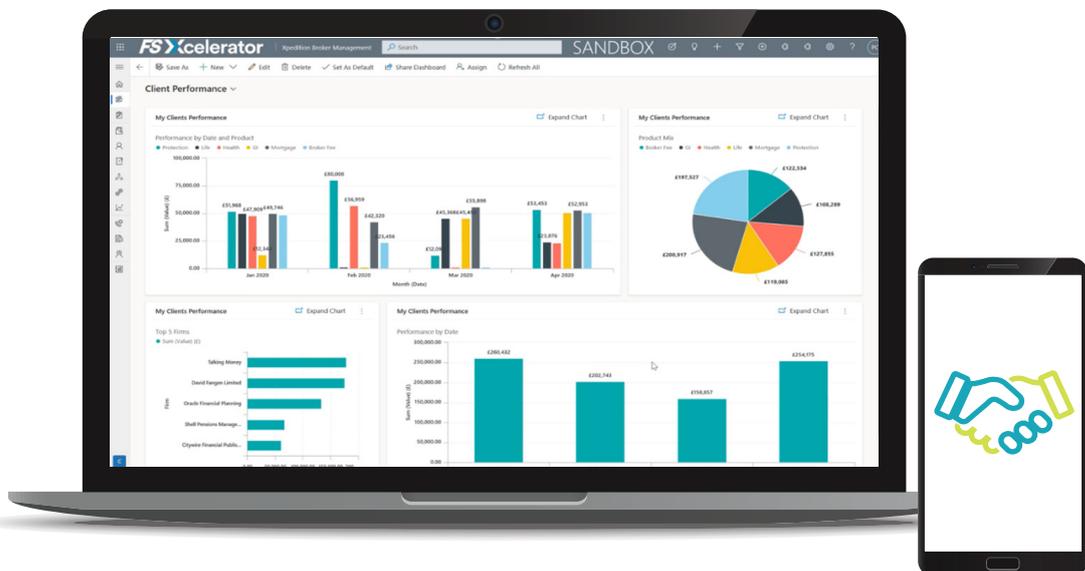
Streamline onboarding, gain detailed insights into performance, and strengthen vital relationships



Broker Management App

Increasing competition from digital disruptors combined with evolving client expectations means financial services firms need to ensure they are optimising every available distribution channel, including their agents and brokers, to overcome the significant challenges they now face.

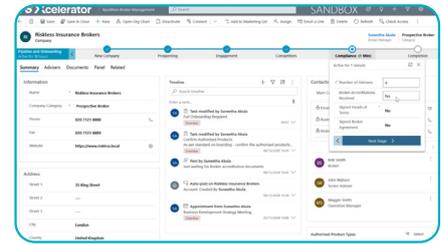
With this in mind, Xpedition has created the Broker Management App. Designed for organisations that work with agents and brokers, the app streamlines broker onboarding, provides enhanced insights into broker performance enables convenient tracking of broker accreditations and certifications, and strengthens the relationship between firms and their brokers.



Key Features and Benefits

Streamlined broker onboarding with configurable process stages

Prospective brokers can be taken through a full onboarding process to ensure all required information is captured in a structured and consistent manner. Fully configurable process stages lead users through relevant steps, profiling the firm and identifying the potential for a successful partnership.

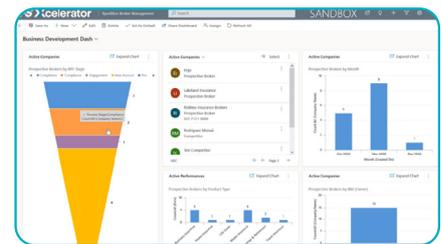


Clear, detailed dashboards for effectively monitor broker performance

Detailed dashboards provide insights into broker performance, identifying their value by metrics such as product and period, and highlighting high achievers in the channel.

Track all information around the contacts, authorised products and activity being carried out. Full profiling and marketing data provide a complete picture of the company to enable accurate classification and targeting.

Track the firm's business plans over time give an immediate visual reference to highlight areas of concern, required development or opportunity.



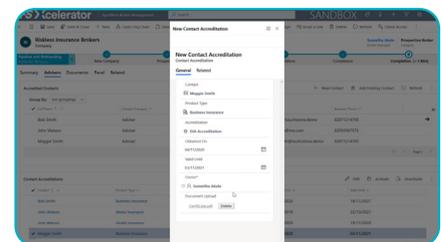
Stay in the know with up-to-date value statements

Access regular reviews via value statements populated with the most up-to-date data and intelligence delivered directly from the system, providing a complete overview of broker status and performance.



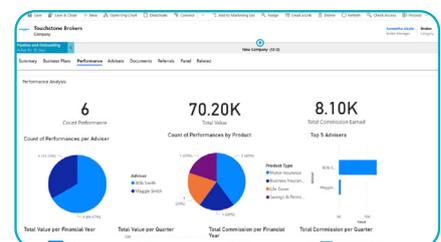
Capture broker accreditations and certifications

Capture accreditations and industry certifications that the contacts at the broker may possess. Also record certificate expiry dates and the requirements for renewals to help identify opportunities for additional training.



Pre-determined KYC templates

During the KYC stage, data can be captured around income and expenditure, using pre-determined templates.



Get in touch to learn how the Broker Management App can help you streamline broker onboarding, monitor and track agent and broker performance, build stronger relationships, and gain valuable insights into the strength of relationships between brokers and competitor firms.

Speak to a specialist today.

To learn more about Xpedition, visit:

xpedition.co.uk

Or contact us on

+44 (0)20 7121 4705 info@xpedition.co.uk