Questions from the CTG2016 app

Q: Out of interest how many in the room used the app to answer the feedback questions?

Responses varied depending on the question and the session, but overall questions were answered by more than half of the attendees at London and a third at Manchester.

Q: Can you email providers securely from iO?

While you can send secure message to a client portal user, the functionality to contact a provider securely via Intelligent Office or PFP is currently not available.

Q: What are the main differences between an Event List and a Workflow?

Event Lists have been available in iO for a number of years. This allows the user to create a series of tasks that can follow a particular business process.

The ability to add a Workflow is more recent functionality within iO that provides enhanced functionality not available when adding Event Lists. This includes: -

- Automatic triggering of a Workflow on creation and change of Status of a plan, the adding and changing status of a plan.
- Tasks can be set up run Concurrently or consecutively and be assigned to specific users or roles.

For more information on the functionality of Workflows please see our pre-recorded webinar link below:

https://www.intelligent-office.net/documents/help/new/userguide/01_Video/a_webinars/WorkflowSetup-[090115].mp4

Q: On APi - what does 245 Calls mean. Is that the number of fields that can be synched?

245 Calls are the number of end points that are available to call upon, these endpoints then surface data. The total data surface area expands to thousands of fields. For further information, please review the Beta APi documentation which can be found at https://intelliflo.developer.com this will provide more detail on each end point as well as a data dictionary.

Q: Please can you make available the link for client registration?

Each advisory firm will have an individual URL domain which can be can found within the Administration > Group > Corporate Identity area for each group on Intelligent Office.

Q: If you share a task with the client, can they update this?

The purpose behind having tasks visible on the client portal is to provide the portal user / client a view of the servicing that has been offered by the adviser. Client portal only have read rights for tasks, only an iO user can update the task. Tasks such as 'Annual Review' are generally exposed as this gives a clear view on when the next meeting is due.

Q: Concerns over cloud security. How do we know it's secure?

All the data is held in an extremely secure environment the same security levels as the banks. We use the strongest 256 encryption to protect the data in transit at all times. We do not store any banking credentials when using the Premium integration via Yodlee only transactional data and your balance is used via this service. You cannot transfer money in our out via PFP and neither can your adviser.

For more information on PFP security, please visit the "Security" link at the bottom of your PFP page

Q: When a client updates their 'profile' and this updates in the iO fact find, do we get notified of this change?

A change notification can be setup, whereby the servicing adviser will receive an email on a daily basis, at a designated time, which will list the names of clients who have made changes in PFP. Clicking on the client's name will take you to the clients PFP Changes page, providing you a transient view of the changes made.

This information and more can be found on the user guide link below:

https://intelligent-office.net/documents/help/new/userguide/Content/PFP_Administration.htm?Highlight=transient

Q: What is the typical take up of PFP by clients at firms that use it?

The take up is based around the number of new clients and reviews in a month. This ranges from 10 - 150 per month, though can be more as it is dependent on the size of the firm and number of clients the firm has.

Q: Do IFAs tend to charge for PFP? If so how much?

The cost of PFP is included as part of your licencing cost for iO. Clients can access PFP premium functionality for £1.20 on a monthly basis. If the advisory wish to pay for PFP premium functionality on behalf of selected clients, this can be arranged.

It is up to your firm if you wish to charge for access and build this into the service proposition.

Q: What literature is there to explain PFP to clients or is it only best to demonstrate this live? If so, is there a demo of PFP I can use with them?

We can provide you with a consumer brochure to provide to your client, in addition to other marketing collateral (i.e. email templates, promotional videos). The promotional video can be used to demonstrate the concept of the portal. You can also set up a dummy client for demo purposes on your iO account.

Q: Does PFP take into consideration a mobile first and mobile only environment?

Mobile first is a design concept for building software which focuses on building an app which is designed specifically for mobile devices (i.e. phones) before considering what the web version of that same piece of software will look like.
Take Uber for example which (probably) built a mobile app version of their software before expanding out to a web version.

PFP was actually web first and the mobile apps were designed to complement the web version with an abridged version of PFP. This is in line with banking providers who tend to have some online site for their clients to use and a mobile app to get summarised data on the go.

What google analytics has proven is that our current majority users are the older demographic accessing PFP via web with little mobile take up when compared to web usage.

This may change in the future, but for the moment we are focusing on getting the website correct before exploring further enhancements to the mobile apps.

Note: the website is responsive so can be viewed on mobile devices anyway without issue so different devices have been considered.

Intelliflo

Q: On PFP Automated Advice - does this include pensions or just ISAs and GIAs?

As it stands, the end-client is able to invest monies into either an ISA or a GIA. The selection of policies will expand as time progresses.

Q: Do the alert emails being sent from PFP to a client come from our company email address or an Intelliflo address? If from Intelliflo, is there some way we can change the way the email shows to be from address?

Any emails sent from IO to a client will always show from the company email you have set up.

Q: Do you have any figures on increased revenue figures from those clients who took up PFP? Presentation said contact had gone up but did it result in increased revenue.

Providing the end-client a portal that facilities document sharing, and the ability to complete basic fact find information reduces the need to print and post documents to your clients, and therefore decreases the allotted cost that comes with that.

By facilitating the above, your advisers and administrators are able to also optimise their processes, and decrease not only the financial cost of producing and providing the documentation to your clients, but also the opportunity cost, as well.

Automated Advice builds on this by offering an additional revenue stream and the ability to engage with clients who would otherwise not interact with their adviser.