

10 reasons to use Intelligent Office – mortgage brokers



Intelligent Office (iO) is a fully secure end-to-end sales and compliance business management software for mortgage and protection brokers. This ‘one-stop shop’ lets you manage all your client and provider data within a single technology eco-system and aligns it to your service proposition enabling you to:

- Drive efficiencies within your business
- Build stronger customer relationships
- Extend your client proposition and enhance engagement
- Assist with regulatory compliance
- Be innovative through flexible technology and partnerships



A single integrated ‘eco-system’

iO is your front, middle and back office system – one place where you can seamlessly and efficiently manage the entire mortgage process, adhering to all regulatory requirements such as GDPR.



Full control over your sales process

Workflow processes can be utilised to underpin your sales process ensuring robust systems and controls. Add prospective leads, convert these to clients and complete fact finds.



Unrivalled market integrations

Using our ‘best of breed’ philosophy, iO integrates with a number of third-party sourcing partners and quote portals including MortgageBrain, Trigold, Assureweb (iPipeline) and The Exchange.



Extensive management reporting

Monitor and analyse your business with access to a comprehensive suite of MI reports.



Secure access wherever you are

iO is cloud based software, meaning that you can access it anytime, anywhere. It is functional across multiple platforms including Mac, iPad, iPhone. All you need is an internet connection.



Meet your clients virtually

iO’s integration with Salemove enables you to meet your clients in a virtual space securely within the Personal Finance Portal. Text chat, audio and full video meetings can be held and you can also co-browse with your clients, looking at the same document in real time.



Fees and commission tracking

iO has the most powerful income and fee matching reconciliation functionality in the market, allowing you to input, reconcile and monitor your income.



Compliance

Standardise and automate your compliance to ensure you meet all regulatory reporting requirements at the touch of a button.



Client portal

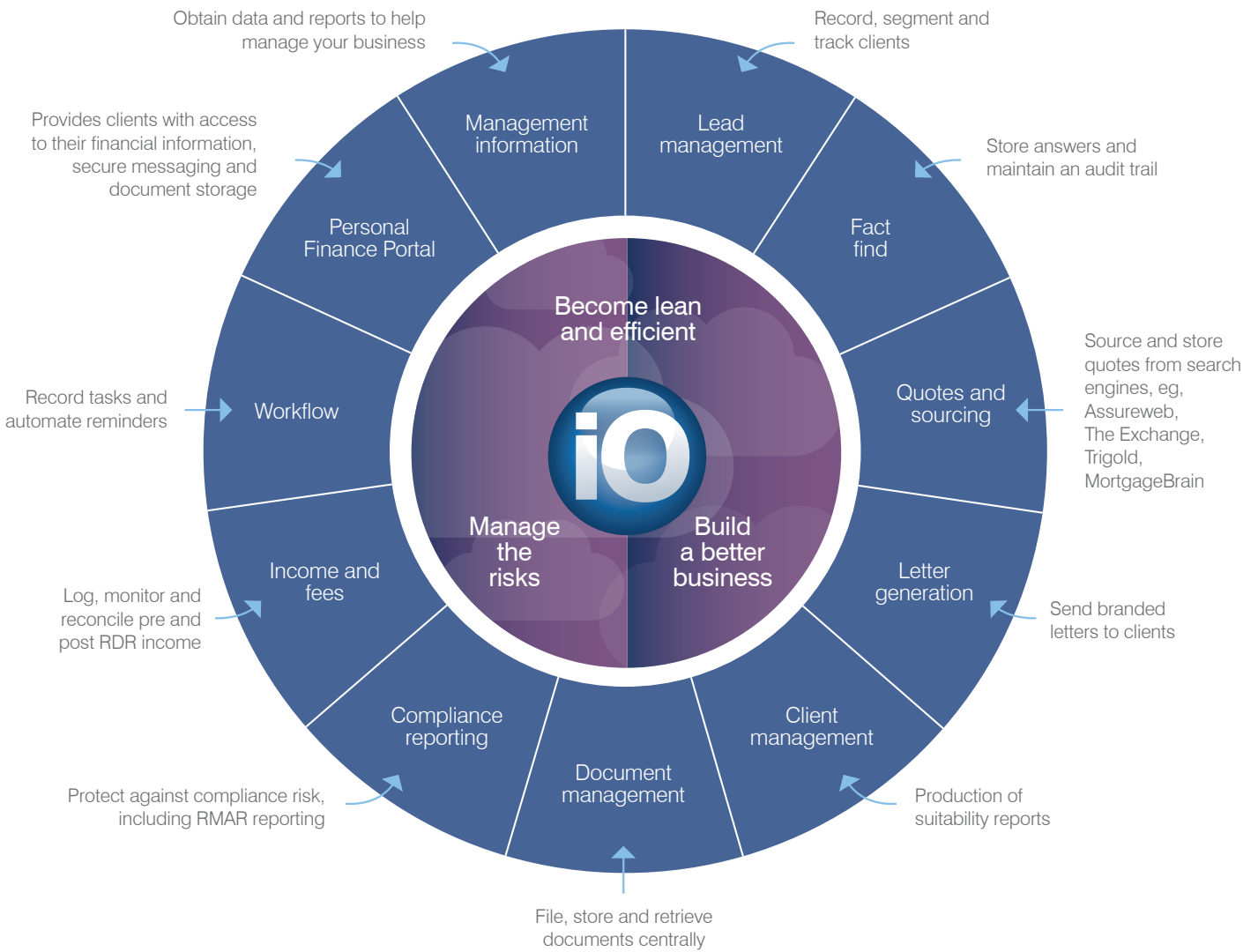
Send secure messages and share important documents via the Personal Finance Portal (PFP). Your clients can update their personal information which populates the iO fact find. This frees up more time for you to focus on providing valuable advice.



iO Store

A store for third party software applications to link directly in to iO via an open API. This gives you a choice of best of breed tools to enhance the services that you provide to your customers.

Intelligent Office – at a glance



The mortgage process – technology underpinning multiple touch points



For more information call us on 0845 230 3800 or email us on info@intelliflo.com