

FACT SHEET:

Flashlight data service



What is the Flashlight data service?

Intelliflo's Flashlight data service has been exclusively designed to enhance the way that bulk valuation files are dealt with from providers. This means that we are able to cleanse data in Intelligent Office (iO) and ensure that you get the most from your data.

We compare the data in the client record to the data that the provider supplies us within the bulk file and highlight where changes are needed to correct your plan data to ensure it is as accurate as possible. This means that data errors are reduced, improving your data processes. Once this has been completed, firms will be able to achieve 100% bulk valuation processing.

Benefits of the service for you?

- Reduce administration costs
- Reduce time calling providers directly
- Enhance your data quality - enabling you to spot trends
- Gain greater detail on AUA and income allocation
- Stay compliant with GDPR by taking every reasonable step to ensure data is accurate

We use a four step process to cleanse your data.

"We saw an 88% reduction in the time it takes to research valuations and have reduced time for management and regulatory reporting by 75%."

Clairville York Ltd.

Four step process

Bulk file adoption and setup



We analyse your bulk file data to ensure that they are configured correctly. Our valuations support team are on hand to help.

Pattern matching



Once the valuation data has been uploaded into iO, we look to find consistent patterns in the plan numbers which aids the matching process. We will also identify unmatched client data from the provider's bulk file.

Matching back to iO



Now it's over to you. We will provide you with a data file that contains the information from the provider and our analysis as well as a suggested client match link. From initial pilots, we estimate it takes fewer than three minutes to update a client record.

Cleanse the remaining plans in iO



Once the bulk file is 100% matched, we can compare this to the live data within iO ensuring that plans are at the correct status and under your agency.

Stay compliant with GDPR and ensure your data is accurate and up to date with our free Flashlight data service.

Get more out of iO and unlock the power of your data. To see how IPA Financial Services benefitted, [click here](#).