

Glia (formerly SaleMove)

Co-browsing technology through the Personal Finance Portal



Overview

Intelliflo's integration with award winning Glia technology, offers the option to interact digitally with your clients via virtual face-to-face meetings through the Personal Finance Portal (PFP), allowing you to:

- Choose chat, audio or full video conversations in real time
- Provide a secure environment for co-browsing - sharing and viewing financial information such as review documents, product options and investment risk mapping
- Integrate with the PFP and store all conversations securely against the client record



Benefits to you



Time saving

Traditional face-to-face meetings are time intensive for both you and your clients, but having personal interaction is one of the foundations of your service. The ability to speak face-to-face with a client via a recordable digital format saves time whilst enhancing the client relationship.



Risk management

All contact is stored securely for future reference, meeting the requirements of MiFID II.



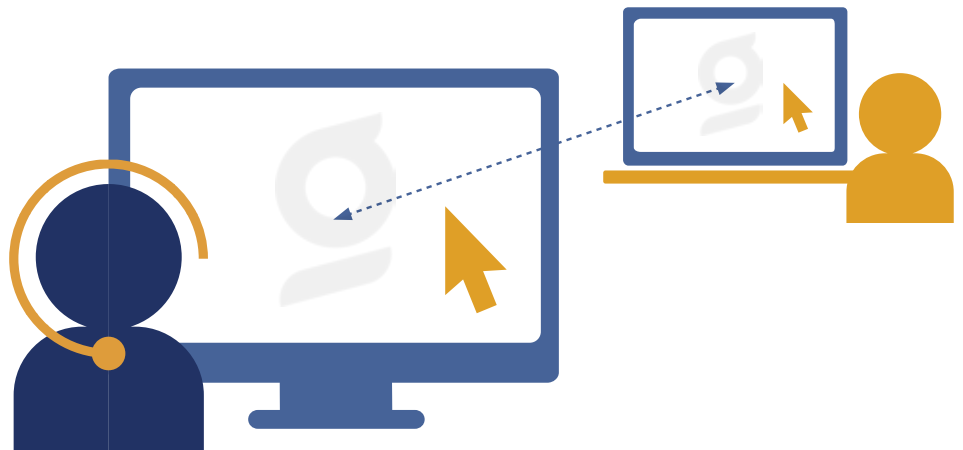
Meeting modern client service expectations

Automation is a cornerstone of the future client experience and the speed and security of this functionality allows you to meet client expectations for online communication in an engaging and efficient way.

About Glia

Glia creates digital-first moments that simplify and transform communications between financial institutions and their customers using messaging, video, voice, co-browsing, and artificial intelligence without the need for downloads or installations.

Glia has recently received a \$20 million Series B fundraising led by Insight Venture Partners, and has won Best of Show at Finovate (five times), Orion Ascent/FUSE, Dig-In Insure Analytics and AI, and CUNA Government Affairs Conference.



Learn more

If you have any queries relating to **Glia** call us on **0330 102 8402** or email us at sales@intelliflo.com where one of our executives would be pleased to help you further.

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