

SSP Swift

Tailored IT solutions to save you time and money.

SSP Swift is a smarter way to manage IT for your business. Everything has been designed to be intuitive and user-friendly, to save you as much expense, time and stress as possible.

Your challenges.

The changes wrought by the Retail Distribution Review (RDR) on the financial advice industry mean that it's never been more important to have a central IT system that can help you build your relationships while driving down client management costs and ensuring compliance.

It is this key challenge that could very well come to define those financial advisers that thrive and those that fail in the post-RDR industry.

Your solution: SSP Swift.

SSP Swift is a smarter way to manage IT for your business. Our IT experts host and maintain your servers and software for you, keeping them updated, protected and backed-up; while your staff can access whatever they need over the internet – anytime, anywhere.

Everything has been designed to be intuitive and user-friendly, to save you as much expense, time and stress as possible. Whatever the size of your business and whatever your needs, SSP Swift can be customised to meet them.

At the core is a full-featured, end-to-end client and policy administration system that can work off the shelf or be tailored to work how you run your business – with continued product investment to ensure your future requirements are met.

SSP Swift brings benefits in terms of efficient client management, compliance, cash flow reconciliation and more. Amongst other features, it allows you to create your own workflow tracking, generate customised reports, import data from external sources, create marketing lists, and send and record communications. In short, it enables you to maintain the best possible relationship with your clients.



Simple is better than complex.

With increasing fines being issued by the regulator, the proactive, early identification of potential risks will help limit your liability from the outset.

How SSP Swift can help your business.

Client management.

Improved productivity and efficiency are key to staying competitive, and SSP takes care of all business fundamentals with our end-to-end client and policy administration system that can be tailored or 'off the shelf'. You can be self-sufficient when it comes to looking after all your client and policy data and managing policy information; adding new products and policies is quick and easy, and business and workflow processes can be easily set up and maintained to help increase business throughput without increasing resources and costs.

Compliance.

It is vital that the software you use makes being compliant, and evidencing that compliance, as simple and efficient as possible. SSP Swift provides pre-configured, adaptable compliance workflow, risk-based case checking and integrated document management to help you meet regulatory requirements. With increasing fines being issued by the regulator, the proactive, early identification of potential risks will help limit your liability from the outset.

Cash flow.

Cash flow is vital to the success of a business, regardless of size. Whether you're a commission-based business moving to fees or already fee-based, the RDR Adviser Charging policy will mean changes to the way in which charges are recorded and reconciled. This will inevitably involve a period of transition with both legacy commission and new fee and credit models requiring administration.

SSP Swift's cash components allow commission (Initial, Renewal and Trail) to be recorded and split according to your business model and automatically reconciled using Commission EDI. And fees can be recorded and invoiced at client, policy and submission level, providing full flexibility for different business models. In addition, the system fully supports notional credit and target tracking.

SSP Swift's unique business intelligence solution can help you understand what's driving the performance of your business and take steps to improve that performance.

SSP Managed Service.

A sophisticated IT infrastructure presents new business risks and needs investment and management. SSP Managed Service can look after your hardware and software for you, and maintain the highest levels of security for your network and applications.

SSP Swift uses cloud computing. This means that our data and storage services are not situated on your premises. The key benefit here is that you do not need specific knowledge of the system, nor will you need to deal with any storage, data or maintenance issues personally – simply leave it all to our service experts.

With SSP Swift, expansion and integration from an IT perspective are easier to budget for, easier to implement and less disruptive to operations. We take care of everything: the client management system, quotation systems, electronic evaluations, third-party products, email and security. We upgrade all the hardware and software as and when necessary, and back-up all your data every 24 hours, with a reliable 99.9% uptime. And users can access them from anywhere with a broadband connection.

Business intelligence.

SSP Swift's unique business intelligence solution, SSP iSwift BI, can help you understand what's driving the performance of your business and take steps to improve that performance.

With dedicated analytical capability, you can drill down into your data and see areas of your business that are not performing well, identify areas of opportunity and growth, understand the consequences of your decisions, reward staff who are performing well and educate those who are not.

Our solution pulls data from your core SSP system already in place. You can identify sales trends by product, region, office or adviser, spot cross-selling and up-selling opportunities, and adjust marketing, sales and service resources as necessary. In addition, you can analyse and interrogate large volumes of data without slowing down your systems when your colleagues most need them.

Simple is better than complex.



We've been developing world-class solutions since 1984 that are used by organisations in more than 50 countries.

SSP Professional Services.

Whether you're trying to keep up with market changes, follow industry best practice, derive greater efficiencies in your business, or just simply stay ahead of your competitors, we have the knowledge, talent and technology to help you succeed.

We've been developing world-class solutions since 1984 that are used by organisations in more than 50 countries. And we're the only company in the sector with over 750 people focused on insurance and financial services solutions with advice and suggestions that go way beyond our IT capability.

SSP Data Services.

When it comes to transferring data – whether replacing your existing IT system, or integrating an acquisition that's running a different system - we have one clear objective: to transfer as much information as possible, as quickly as possible, to protect your assets and cause the least amount of disruption.

Our approach focuses on four key tasks. First: reducing the preparation work required for the data migration. Second: increasing the amount of data that can be transferred, which minimises the amount of data re-keying. Third: reducing the actual data transfer time between systems to minimise downtime in the business. And finally, validating the data to make sure it's intact.

Key benefits.

- Increased sales.
- Reduced administration time.
- Increased customer satisfaction and retention.
- Improved cash flow for your business.
- Increased productivity.
- Regulatory compliance.
- Reduced burden of owning and running IT.

For further information on SSP Swift, call us now on **0800 590 705** or visit www.ssp-worldwide.com/sspforfinancialadvisers

Head Office: Fearnley Mill, Dean Clough, Halifax, West Yorkshire, HX3 5AX

www.ssp-worldwide.com

