

# SSP iSwift BI

Solutions to improve service levels and increase productivity.

Our business intelligence capability enables financial services organisations to understand the data that forms the foundations of a successful business.

## Your challenges.

In the financial advice industry, knowledge is your core commodity – and building an intelligence base with the edge over your competitors is the key to success. Today, more detailed compliance regulations and the effects of Retail Distribution Review (RDR) implementation, together with a tough business environment, make the need for intelligent business analysis more crucial than ever.

## Your solution: SSP iSwift BI.

SSP iSwift BI is a complete business intelligence and analysis solution. It enables you to drill down into large amounts of data, interact with it, extract richer management information and identify key sales trends. It also allows you to perform 'what-if' analyses to help control budgets and improve business planning whilst demonstrating that Treating Customers Fairly (TCF) is embedded within your organisation.

Delivered via our accredited SSP Managed Service, these solutions provide better service levels by proactively identifying areas for service improvements and service level agreement measurements. It assists compliance with streamlined reporting, from key performance indicators down to individual transactions at the click of a mouse, and increases productivity with multi-dimensional performance metrics.

## Dedicated analytical capability.

With SSP iSwift BI, 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 likely consequences of your decisions, reward staff who are performing well and educate those who are not.

Our business intelligence capability enables financial services organisations to understand the data that forms the foundations of a successful business. It is vital that visibility can be achieved from an 'umbrella view' and at a detailed level to ensure that decision-making is informed and correct, first time.

Our solution pulls data from your core SSP Swift 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 need them most.

## A flexible solution.

SSP iSwift BI is designed specifically for the business user. It requires no specialist knowledge, IT or otherwise. It's powerful - with dashboards and alerts, multidimensional analysis, as well as data manipulation. And it comes without the limitations, complexity or cost of traditional reporting tools.

Furthermore, SSP iSwift BI is unique to the financial services industry. It can be deployed in days, users can be trained in hours – and they can get answers to their questions in seconds, helping them make the right decisions quickly.

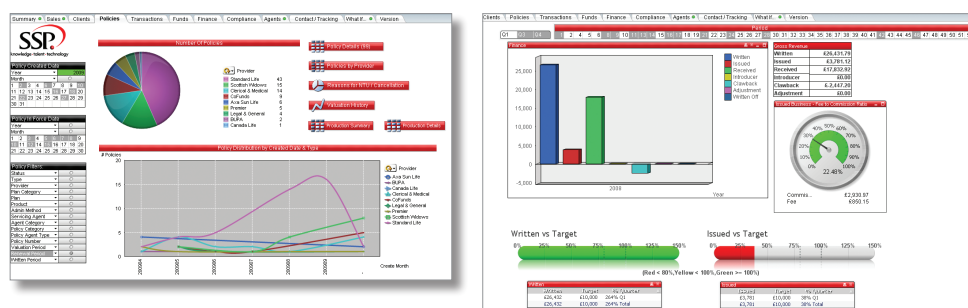
**Simple** is better than complex.

### Key benefits.

- Efficient business planning.
- Manage compliance effectively.
- Unique to the financial services industry.
- Improve service levels.
- Increase productivity.

### The specific information you need.

SSP iSwift BI gives you a complete, graphical dashboard view of your business at the click of a mouse. It instantly gathers up all the data in your SSP Swift client management system and lets you analyse this in seconds, compare actual figures to budget and spot trends. The dashboard can be tailored for each user and set up to show the key performance indicators and reports needed.



Chief executives and finance directors can get an overview dashboard, giving them the big picture immediately, including the value of the business. Analysts can see more of everything from the start, without rigid restrictions to work around. And sales staff get quick access to account or prospect information, making their calls more effective.

### Trust 'one version of the truth'.

A suite of standard reports and spreadsheets is no longer adequate for the climate in which we work. We increasingly need to examine data in greater depth and find answers to myriad questions - fast. And to do this, you need a dedicated analytical capability.

SSP iSwift BI supports interactive analysis over large volumes of data. It can interrogate all data in multiple sources and multiple branches, whereas using a standard spreadsheet can result in missing areas. And it can analyse masses of data in seconds, thus giving all employees 'one version of the truth'.

For further information on SSP iSwift BI, call us now on **0800 590 705** or visit [www.ssp-worldwide.com/sspforfinancialadvisers](http://www.ssp-worldwide.com/sspforfinancialadvisers)

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