

Press Release
November 6, 2018

Innovative digital engagement software launched by Focus Solutions

Fintech provider Focus Solutions today announced the launch of **focus:digital**, game-changing software that will transform the face of financial advice. It gives wealth managers, banks, IFAs and anyone on the client-facing side of financial advice a digital platform to offer their clients to make the advice process an interactive and streamlined experience. **focus:digital** can sit either directly on the adviser website or could be integrated within it.

The software is designed to be much more than just gamified fact-finding; **focus:digital** brings a client's financial future to life. The new software excels in four key areas.

Acquire and on-board clients

- Engaging and intuitive tools provide consumers with a “financial health check”
- Help clients get past the barrier of understanding, allow them to discover a need and see how to solve it.
- A central dashboard keeps track of goals, provides nudges and lets consumers build a financial plan.
- Streamlined on-boarding tools create new accounts and assign 'needs-based' fact finds.

Easy to use (for everyone) toolset

- Triage rules seamlessly direct consumers to the right sales channel, from robo to simplified or holistic advice.
- Modular, modern web apps can be embedded in adviser websites, and 'co-browsed' using our collaborative, multi-person screen sharing software.

Build great relationships

- Clients know what they want to talk to an advisor about.
- Advisers know enough about the client at first contact to have a meaningful and valuable conversation right from the start.
- Connectivity and collaboration tools let advisers and consumers work together, wherever they are.
- Intuitive, focused experiences re-engage with, and retain, clients at little cost.

Lifetime client value

- A single underlying data model shares data between modelling tools, including our interactive cash flow modeller and back-office system.
- Embedded modelling tools allow client portal users to repeat the original acquisition experience and re-engage when they have a problem that they want help with.
- Intuitive modelling plus personalised, relevant content gives high-value client engagements.

Mike Hearfield, Head of Digital at Focus Solutions, said: “We want to change the way people engage with their finances, making it easy to ‘save smarter rather than harder’. Our vision is one where consumers feel calm and in control of their finances, supported by intuitive and engaging tools that connect people rather than confusing them.

“We’re helping our customers build sustainable lifetime client value through game-changing digital experiences. Feedback from all users has been amazing and we’re excited to be engaged with companies from across the industry who will be bringing this to market soon.”

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Notes to editors

About Focus Solutions

Founded in 1995, Focus Solutions is a financial services software house with a track record of providing effective advice and business automation, CRM, T&C and financial planning solutions. Focus Solutions works with leading financial advisers (at both network and firm level), bancassurers, product providers and mortgage lenders to deliver solutions across a range of products such as investments, pensions, protection, mortgages and general insurance. Since 2011 Focus Solutions has been fully owned by Standard Life but operates independently.

www.focus-solutions.co.uk