

What is FPS?



A purpose built **Financial Planning Solution** that integrates with a number of leading Microsoft products.

FPS utilises Microsoft Dynamics CRM and Microsoft Office to deliver an efficient and effective environment for consistently managing financial planning practice interactions with clients, dealer groups and other associated professionals, such as Accountants, Solicitors, etc...

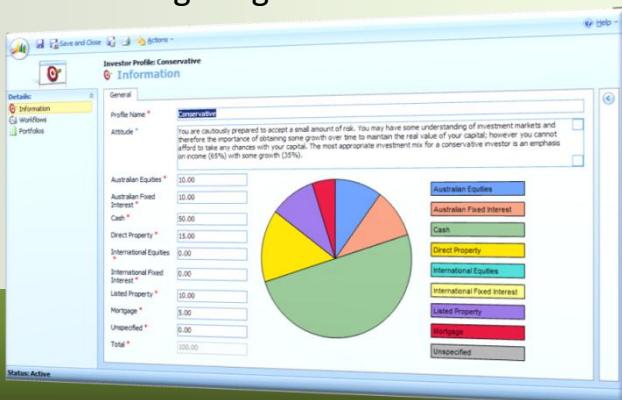
Microsoft Dynamics CRM + FPS work as a natural extension of Microsoft Outlook and Microsoft Office, delivering a familiar solution that promotes fast user adoption and higher utilisation.

By providing centralised access to information, consistent processes, and real-time insight, you can empower a more consistent, productive company.

After all, your main goal is to provide an unrivalled quality of service to your clients, not to spend time figuring out how to use software.



- ✓ Increase qualified sales leads to attract more clients.
- ✓ Retain more clients through improved client loyalty.
- ✓ Spend more time with clients and less on administrative tasks.
- ✓ Maximise cross-selling/up-selling opportunities.
- ✓ Use automatic workflows to increase employee effectiveness.
- ✓ Share complete client information across existing systems.
- ✓ Reduce exposure to technology related risks.





In Your Business

Your business is in a constant state of flux. Keeping up isn't enough—you need to keep ahead. That's why forging strong client relationships and growing new relationships has never been more important.

This involves three basic steps:



Finding and developing client relationships



Keeping clients happy



Growing these relationships to enhance your business profitability

Why FPS?

With increased consolidation in the financial services industry, large institutions continue to get larger while small to midsize businesses require new and innovative strategies to remain competitive, create growth opportunities, and contribute to the bottom line.

In this highly competitive marketplace, your company needs a solution to help differentiate it from its competitors.

Automating and streamlining day to day processes, FPS brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.



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