

# The Income Protection Specialists

## Friends First and BrokerCRM Collaborate on Protection

As Income Protection market leaders, Friends First are delighted to announce a number of collaborative features developed with BrokerCRM within their leading BrokerCRM software.

These features support you in the sales and application process of Income Protection from identifying prospects to submitting applications.

- Highlight Income Protection prospects within your client base
- Calculate Income Protection needs
- Calculate the maximum benefit allowable for a client based on social welfare status and occupation.
- Determine accurate occupation classification.
- Complete and store Income Protection quotations.
- Produce a user friendly report highlighting Income Protection needs and summary quotation details.
- Upload application details to Friends First for ease of online completion. (also supports the upload of Life Protection applications)
- Link to the comprehensive Friends First Income Protection Toolkit and range of Marketing Supports.

- These features are fully integrated within BrokerCRM and Friends First online services.
- They are automatically available to all BrokerCRM users at no extra cost.
- BrokerCRM Lite users can use these new features immediately.
- Users of BrokerCRM - server install can arrange an upgrade by contacting [support@brokercrm.com](mailto:support@brokercrm.com)
- If you are not an existing user contact BrokerCRM at 065 6849675; [info@brokercrm.com](mailto:info@brokercrm.com)

**“I am confident that these simple to use tools will make it even easier for brokers to identify and advise prospects on their income protection needs”.**

**Karen Gallagher**  
Protection Business Development Manager  
Friends First.



Access our simple to use guide to these features at [www.brokercrm.com](http://www.brokercrm.com) or [www.brokerfirst.ie](http://www.brokerfirst.ie)



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## Friends First / BrokerCRM Income Protection Supports

As Income Protection market leaders, Friends First are delighted to announce a number of collaborative features developed with BrokerCRM within their leading FinancialCRM software.

These features support you in the sales and application process of Income Protection from identifying prospects to submitting applications.

### 1. Identify and highlight Income Protection prospects

- Identify Income Protection prospects using the Market Segmentation facility
- Built in searches help you identify your best prospects for Income Protection.
- These built in searches are marked Level 1 – Level 8
- Prospects can then be targeted in a marketing campaign
- Marketing campaigns can be accomplished through email merge, mail merge or SMS (subject to data protection rules).

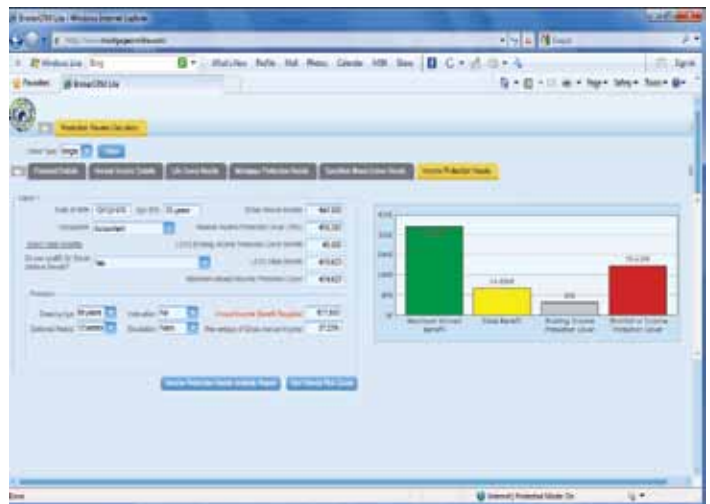
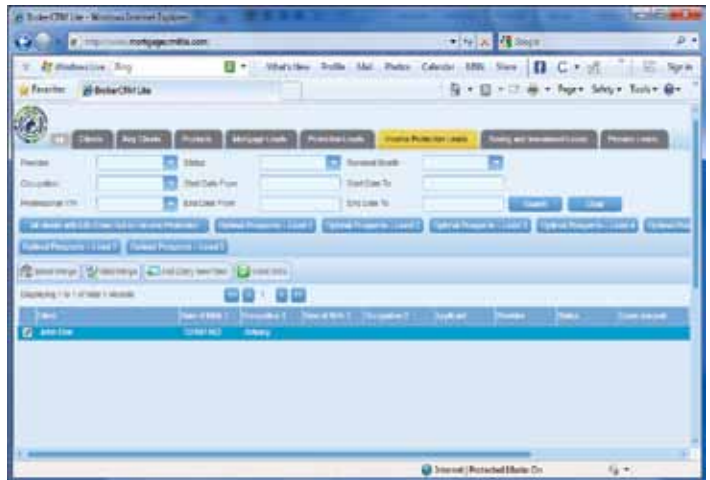
### 2. Analyse a clients Income Protection needs

- You can analyse a client's Income Protection needs using the Protection Review calculator
- This calculator works out the client's unprotected income, taking the applicable State Benefit into account, as well as any existing Income Protection benefits.
- A Needs Analysis report can be generated to provide to your client.
- When the required benefit has been calculated, you can then generate guaranteed and reviewable quotations.

## How to Guide...

The following guide outlines how to use these new features within BrokerCRM to:

1. Identify and highlight Income Protection prospects
2. Analyse Income Protection Needs
3. Complete and store a quotation
4. Upload an application



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## 3. Complete and store a quotation

- An Income Protection quotation can be generated once all mandatory fields are filled (highlighted with a red asterisk)
- This includes Benefit Required, Deferred Period and Indexation. These fields are highlighted with a red asterisk
- You can select an accurate client's occupation from the Friends First Occupation List automatically.
- The quotation displayed will contain 2 possible rates: a Guaranteed Rate and a Reviewable Rate
- All quotation details can be stored against the client record

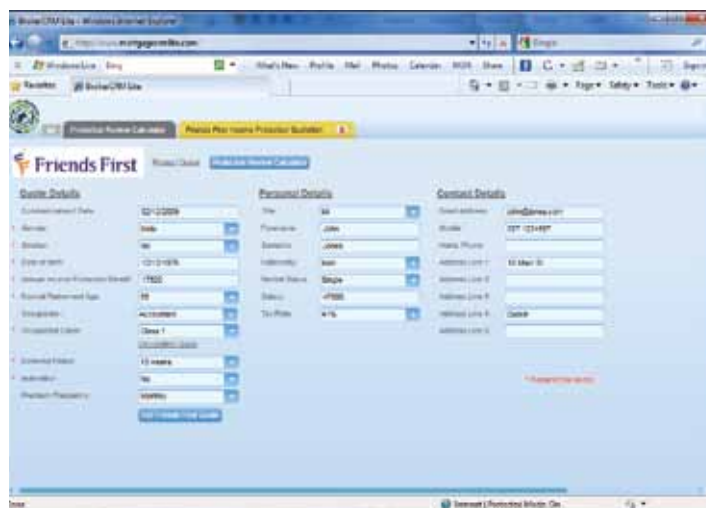


The screenshot shows a web browser window displaying the Friends First CRM interface. The page is titled 'Friends First' and contains a form for entering client details. The form is divided into three main sections: 'Client Details', 'Personal Details', and 'Contact Details'. The 'Client Details' section includes fields for 'Client Reference No.', 'Name', 'DOB', 'Gender', 'Age', 'Occupation', 'Annual Income', 'Annual Premium', 'Occupational Class', 'Occupational Index', 'Annual Index', and 'Annual Premium'. The 'Personal Details' section includes fields for 'Title', 'Forename', 'Surname', 'Initials', 'Home Phone', 'Mobile', and 'Fax'. The 'Contact Details' section includes fields for 'Email Address', 'Home Phone', 'Address Line 1', 'Address Line 2', 'Address Line 3', and 'Address Line 4'. A red asterisk is visible next to the 'Occupation' field, indicating it is a mandatory field.

## 4. Upload an Application

### “BrokerCRM- server install” and “BrokerCRM Lite” Users

- After generating a quotation, a proposal can be uploaded to Friends First by simply clicking on a button
- After the proposal is uploaded, the BrokerFirst login page will appear to enable you login
- You will be automatically presented with your uploaded case and can simply complete the remaining proposal questions and submit as normal
- The upload process is the same in both the BrokerCRM - server install and BrokerCRM Lite systems



This screenshot is identical to the one above, showing the Friends First CRM interface with the client record form. It highlights the same fields and the red asterisk on the 'Occupation' field.



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