

FLP®

PRESS RELEASE

FLP® PROJECT HAS BEEN SUCCESSFULLY COMPLETED AND DELIVERED TO D&F FINANCIAL GROUP, AN INSURANCE AND INVESTMENT ADVISORY GROUP

[2005-10-11] *FLP Development Team*

D&F Financial Group is an insurance and investment advisory group providing diversified professional investment consulting services. Her scope of business includes insurance services, capital raising, investment plans, and professional business services.



A BREAKTHROUGH DECISION

As the business nature requires close personal contacts with client, the business process and documentations largely relies on simple entry-level database without security controls. Copies of documents are required to ensure different personnel in the group to get to know of a transaction. Commission schemes and calculations are all spreadsheet dependent. Emails with clients are restricted to each agent while central filing of correspondence was loose. All sound familiar with most of the local companies. The expanding business has rendered that the typical inefficient management system becomes unable to facilitate quick share of information. More importantly, staff works always duplicate and yet errors were inevitable. In June 2005, their board made close evaluations of the common software solutions in the market and they selected FLP® Enterprise Management System.

FLP® JOB MANAGEMENT

FLP® helps well on the job management. Every enquiry is treated as a job and is allocated a unique job number. Every stage and progress of the job can be easily monitored by authorized staff.

FLP® AUTOMATE BILLING WITHOUT A MISS

Before using FLP®, billing a client is a manual task. The problem is recurring billing which is very often forgotten, resulting in loss of revenue. Now that FLP® is being employed, billing is done automatically.

PUNCTUAL AND ACCURATE COMMISSION

FLP® offers the distinct advantage to D&F group in the accurate and punctual commission. Commission calculation is a complicated exercising which involves complicated schemes and tiers.

FAST QUOTATION AND COMPETITIVE PRICING

All products and pricing are centrally put together in the FLP® product manager. This lets the agents send out a quote in a minute with accurate product description and pricing.



TIMELY RENEWAL REMINDER

A timely policy reminder means make fast the revenue generation cycle. With the new FLP® system, renewal reminders are automatically triggered before prescribed expiry dates and the reminder can be emailed to clients.

FLP® DOCUMENT MANAGEMENT

One of the new features is to store electronically and centrally client information and signed documents. Future references to the documents are easy.

FLP® CUSTOMIZED TO THE BUSINESS AND ALL-IN-ONE

The FLP® system is a combination of our professional experience and business knowledge and technical know-how. More importantly, we have rich experience in re-engineering and excellent communication and implementation skill.

FLP® CONSULTING: SOFTWARE, HARDWARE AND REENGINEERING

FLP® is more than computer software. FLP® provides professional consulting service at no extra cost. Even for a company not having a sizable IT department, FLP® advise on the operating system, software and hardware. FLP® also works along with you to plan for phases of reengineering.

