SENRO Usage Report

Your Current SENRO Usage is 65.79%

Following an initial analysis, we have established that you are using approximately 65.79% of SENRO's functionality. Our aim is to work with you to improve this and ensure you get the most from your system.

Please read the information below, it is broken into 3 sections.

1. **System Overview** Sections you currently use and other sections you don't benefit from.
2. **Developments** New releases and our thoughts on which developments may be of interest.
3. **Training** Sessions currently running and our recommendations on what you should attend.

System Overview – Brief Analysis

The table below confirms what you are using and not using in SENRO. This is a best estimate based on our system analysis. Please feel free to update us on any information that may help us to support you further.

Pipeline Management	Diary Management	Reporting	Additional Tools
✓ Mortgage Files	✓ Chase Diary	✓ Performance Reports	✗ Fact Finds
✓ Protection Files	✓ Task Diary	✓ Business Spread Report	✗ Marketing Filters
✓ General Insurance Files	✓ Review Diary	✓ Income Reconciliation	✗ Letter Templates
✓ Pension Files	✗ Appointment Diary	✓ Payment Reconciliation	✗ Introducer Access
✓ Investment Files		✓ Staff Account Balance	✗ Document Storage
			✓ SMS

For more information about each area, please read the notes on page 2.

System Overview – Full Analysis

Access to SENRO

- All users are actively logging in and using SENRO.

Pipelines

- All business is being entered, but information is missing such as sent dates and/or commission values. This means SENRO cannot produce business production reports.

- For all business entered in SENRO you are entering case notes and next chase dates, but not on all cases. This means SENRO cannot actively help you manage your full pipeline.

- Some of your pipelines contain a number of historical cases. This needs to be addressed and cases either need to be marked as complete, NPW or chased.

Chase Diary

- You are using the chase diary to follow up pending business, but you have a number of historical chases that need clearing out. To remove these, you need to create a note in the file and delete the next chase date.

Task Diary

- You are using the task diary to actively manage tasks, such as new referrals, however there are some historical tasks that need clearing out by setting the status to completed or cancelled in the task page.

Review Diary

- You are using the review diary but some cases a missing a review date.

Appointment Diary

- You are not using the appointment diary in SENRO.

Reports

- Because you are not entering all business with sent dates and commission values, SENRO cannot product accurate business performance and business spread reports.

- You are using SENRO to fully reconcile your commission payments, including Outstanding Fees, Staff Reports and the Fees Account Balance.

Additional Tools

- We do not know if you are using the Fact Find tools.
- You are not using the Marketing section and Letter templates.
- You are not using the introducer section that allows 3rd party access for referrals.
- You have SMS, so you can send clients text messages.

Development Schedule

The table below confirms what developments are currently ongoing, the ones highlighted in bold are the releases we feel will be of interest to you the most.

This is our best estimate based on our knowledge of your business. Please feel free to update us on any information that may help us to support you further.

For further information on each release, please read the notes at the bottom of this report.

Projects In Development – Expected Interest	
✗ Trigold Integration	✓ Commercial Mortgage Files
✓ OTPm Integration	✗ Property Files
✗ Morning Star Integration	✗ Marketing and Letter Templates upgrade
✗ Outlook Integration	✗ Wealth Management / Client Summary
✗ RMAR Report with FSA Integration	✓ Accruals Report
	✓ Trails and Renewals Report
	✗ Superior Access Level controls

Training Recommendations

We will be running a range of centralized training sessions in June/July 2008 for beginners, advanced, new releases, plus commission and fee reconciliation. (In-House training sessions will be available at the usual price.) Training sessions on new releases will also provide a refresher on existing tools. Please read the comments below for any recommendations on training.

- You are using all the basic tools in SENRO very well. Now you would really benefit from understanding the more advanced areas. Therefore, I recommend that you attend the **advanced course**, and we will teach you to use the information entered in SENRO to make your business more productive. This includes the new marketing section, fact finds, superior access levels, task manager and reports.

- SENRO has comprehensive commission and fee tracking; over the next couple of months we will be taking our reporting abilities to another level, introducing accruals, renewals, indexation increases, liquidation reports, projections and even much more. In July 2008, we will be running **commission and fee reconciliation** training sessions. I recommend that you attend this course, so we can teach you how to reconcile all income and payments due. We will also teach you to manage staff debt balances and indemnity risk.

If you would like further information on any of the above courses, please email me at ab@solution4.co.uk

Additional News

Solution4 are currently rebranding all products. On the 1st May 2008, we will be launching our new branding, including our new website and user guide.

If you are interested in reviewing your own branding or website, please contact me on ab@solution4.co.uk

GLOW recruitment has recently been updated with a new employer registration screen, if you would like to find new staff please visit www.glowrecruitment.co.uk. All Openwork advisers receive FREE registration and unlimited job postings till 31st December 2008, please ask your BDM for further information or contact the Solution4 support team on 0845 094 1710.

Further Information on the Development Schedule

Trigold Integration

We are currently working on one way integration with Trigold. Most the development has now been completed and it is scheduled to be released in May 2008.

OTPm Integration

We are currently finalizing the OTPm integration for Openwork advisers. This is scheduled for release in April 2008.

Morning Star Integration

Our fund valuation section is being re-developed to allow for integration with morning star to capture unit prices and provide asset allocation reports. A release date will be confirmed in May 2008.

Outlook Integration

The office section is being completely re-developed to allow for integration to outlook and mobile devices. This is currently ongoing and estimated to take 6 months.

RMAR Report

The RMAR report is scheduled for May 2008 with a release date in July 2008. We are currently working towards integration of the report to the FSA online reports.

Commercial Mortgage Files

In quarter one; we released commercial clients in SENRO. These enable you to create companies and associate those companies to client occupation. Next quarter, we will be building further on the commercial section to enable you to create a commercial mortgage files, produce reports and track the commission. A release date will be confirmed in May 2008.

Property Files

As a number of advisers are now dealing with international property sales, we are developing a property section that will allow you to create and store both unencumbered properties and property sales. A release date will be confirmed in May 2008.

Marketing and Letter Templates

The current marketing and letter templates section is being completely redeveloped. It will include Microsoft Word compatible letters, and cross filters on all products and data. The filters have been developed with various search abilities to extract all scenarios. The first release is scheduled for April 2008, with a further release for SMS and Email campaigns due for June 2008.

Wealth Management / Client Summary

The client summary report will be the first report released. It will coincide with the morning star integration, therefore release dates will be announced in May 2008. In April 2008, all clients will be provided with a visual of the pending client summary report.

Accruals, Trails and Renewals Report

SENRO's commission and fee reconciliation is excellent. We are now taking it a step further to include accruals, trails and renewals for both the practice and staff. This is so you can track that every payment due is paid and no income is missing. These reports have been born from necessity in the market. The first report is accruals and will be released in April 2008. Trails and Renewals are scheduled for June 2008.

Superior Access Levels

SENRO's access levels are very comprehensive and flexible. However, a number of practices have unique set ups and may even have a number of companies providing advice to their own client bank. Therefore, in May 2008 we will be releasing superior access levels. This will enable you to restrict almost any field from individual users, provide access to different companies, provide wider team settings and give you an extra level of protection for your client and business information.