

## Recent SENRO Developments



### Commission and Fee Reconciliation Introduction of key chart within Batch Import Validation.

A key has been created within the electronic commission reconciliation tool to clearly clarify which fee's have been validated / paid, validated / not paid, not validated / not paid.

KEY: Validated/Paid: ✓ | Validated/Not Paid: ✓ | Not Validated/Not Paid: ✓

The electronic reconciliation tool was introduced in Version 4.31 and allows users to import commission statements directly into SENRO, at which point matches will be found and can be paid directly from the import. This feature will also enable you to identify which cases are missing fees and allow you to add them directly from the screen, which cases are missing entirely and indeed which clients. Once these are corrected, it will allow SENRO to run more seamlessly for you and your business.

**The changes detailed above have been implemented as a result of user wishes that have been logged through the online user guide tools on your SENRO systems.**

<http://v4userguide.senro.co.uk/>

Should you require any further information on any of the above subjects, please contact SENRO support on 01275 400660.



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## SENRO News

**We explain how your SENRO system provides an innovative Marketing tool to attract repeat and new business in the new RDR world on page 2.**

**We update you on recent SENRO releases and those that are shortly due for release on page 2.**

**Having trouble installing Outlook integration? We explain how this can be due to your browser settings and what you can do to rectify this on page 3.**

**Does your business utilise SENRO's communication facilities? We explain how you can use these tools to improve business turnaround and proficiency. See page 4.**

### Your Senro System - an Independent System secures your future.

**In this industry we spend a great deal of time talking to clients about the value of investing money in their future.**

With SENRO you have the potential to increase your new business volume, as well as improving efficiency and time management. If the lead management tools or user friendly marketing sections of SENRO help you generate 1 new application per user, this would likely cover your costs for the system for the entire year!

Using SENRO generates more revenue, increases your profit margin, improves efficiency and client care. It substantially increase the value of your company; you have made an excellent investment choice .

And don't forget, by having a **completely Independent system** from a network or network supplier, you have the reassurance that the data contained within the system is **owned by you!**

**Your SENRO System - an Independent System secures your future  
A vital system to hold all your client information and add value to your business**



## Planned System Enhancements

**Improvements shortly to be released onto your SENRO system**

We are pleased to confirm the imminent release of some further enhancements to your current SENRO system.

### Introducer Access Improvements

Introducer users will soon be provided with access to prospect profile 'Notes and Activities' screens.

In here, you will be able to update your introducer users on any information relevant to their referral and also communicate with each other in relation to the lead.

This facility is already available against client profiles and product profiles.

### Marketing Searches and Exports

The enhancements planned for the Search and Export section of the SENRO system include over 70 additional filters and field selections that are to be made available within product, client and activity search categories in marketing.

### OWS (Galaxy) Integration

Integration with OWS (Galaxy) is progressing well, so you will be able to send your client information to Openwork from your desktop.

For more information on any of the above, please contact sarah.king@ekeepergroup.com

More information on our 'wish' service is also available from the online 'user guide' section of SENRO.

<http://v4userguide.senro.co.uk/>



## New Year, New Approach

**The value of marketing for RDR and what SENRO has to offer .....**

**With the financial industry changing as it has over recent years, it has never been so important to focus on generating new business, as well as engaging your current client bank and focusing on client retention.**

It is important that every business recognises the importance of marketing and brand awareness. It is vital to keep your clients informed of new products and services, special offers and industry changes. The information that you gather about your clients, either at meetings or during 'after sales care' is the most valuable asset your business has. To create targeted marketing campaigns you need to access and use this client information easily and efficiently.

SENRO can filter data from your entire client database to retrieve a tailored client list.

Using your selected client list, you can create a personalised marketing campaign to be sent either by mail merge, email or SMS.

SENRO is designed to help you maximize on marketing opportunities and reduce the time and cost required to generate new

business, by potentially saving you money on labour, printing, and postage overheads.

Email marketing has become a crucial part of our businesses, and an email newsletter is often a main mode of engaging your clients, building loyalty and driving sales.

It can also be easy to execute, although marketing in the right way does require a certain 'know how'.

For this purpose, we have put together some marketing 'tips' to assist you in creating effective marketing to help build your business:-

1. Emailing a select few clients suited to the campaign can prove more effective than emailing many at once.

2. ENSURE that you and your colleagues take the time to get email addresses and ensure that they are valid. They are invaluable.

3. For marketing to be really effective, plan a marketing strategy. E.g. Will you send them weekly or monthly?

Will you notify clients on special deals, such as a buildings and contents provider lowering rates? Secured loan lenders increasing LTV?

4. Subscribe to news feeds such as citiwire and Google alerts to get this information, as it could inspire the content of your newsletter. You are also notified of deals, lowered rates and product changes through these services also.

5. If you belong to a Network Group, they often issue newsletters with good commentary that can be used in your own also.

Through this clients and prospects will feel confident that you know exactly what is going on in the market and may prompt them to use your services and recommend you to others.

6. Once you have decided on your approach and designed a schedule, write your email. Initially, keep it brief and informative. Don't try to overdo it until you know what works and you feel comfortable. This approach is more likely to work and won't over bear the recipients.

See more SENRO marketing tips on the next page.....



7. Use incentives to get referral business in your email such as a £50 M & S voucher for successful referrals.

8. Don't feel put off if your first few marketing campaigns don't work. You have to work hard to attract business; if you persist and work hard at it business will come.

9. Add an email feature to your website, "would you like to receive our monthly newsletter"? This is a great way of generating leads. If a lead wants to subscribe to your newsletter, you know that they already require your services and are passed through as a warm prospect.

10. Once you know that marketing is something you feel comfortable with, I would recommend creating a newsletter. Templates are available on SENRO for use, if you belong to a network, they also provide newsletters and newsletter templates for you to use.

11. Ensure the link to your website is clearly visible, as well

as any social networking sites you utilise e.g. Visit us on LinkedIn.

12. You may find it useful to do a SWOT analysis (strengths, weaknesses, opportunities and threats) on your competitors to see if they are missing any marketing opportunities, get ideas from them. E.g. Are they on Facebook? Do they keep it up to date?



13. Make use of SENRO's campaign monitor, and run a 'source' production report to establish how successful a campaign has been. From this, it is a good idea to review your marketing strategy and marketing plan, in case any amendments are required. Ultimately, this is a process of trial and error. Measure results, try things, and work out what's best for you.

14. Add a note to the bottom of the email stating "If you don't want to receive (e.g. blanket) marketing, please do not hesitate to contact us". It is important you mention the type of marketing that is being sent to them, as you will still be able to send newsletters or personalised marketing if they are excluded from blanket alone. Don't forget to update the clients contact controls to prevent the excluded marketing type from being sent to them, let SENRO do the rest. This will cover you through the data protection act.

15. If you want to 're-use' a saved search which you are using as a distribution list, don't forget to 're-generate' the search as there may be new clients that meet the criteria specified in the marketing filters.

For more information on SENRO's marketing facilities, please contact SENRO support on 01275 400660.

The SENRO userguide are also available online by selecting the 'user guide' icon on the bottom right hand corner of your SENRO screen.

## Having difficulty installing Outlook Integration? Here's how you can fix it.....

In October 2012's issue of SENRO News, we updated on how our 2 way outlook integration through the SENRO calendar now facilitates Outlook 2010. However, we have been informed by some clients that they receive an error message when trying to complete the plug-in installation.

This may be something to do with your browser security settings and it is incredibly easy to rectify by completing the following steps:

### Firefox

1. Select the Firefox application tab in the top right hand corner of your browser.
2. Select 'Options' and then 'Options' again.
3. In the pop-up, select 'security' and then 'exceptions'.
4. Enter the Outlook plug-in URL and select 'Allow'.
5. Download plug-in once more, this time it should work!

### Internet Explorer

1. Select 'Tools' from your browser options and the 'Internet Options'.
2. Select 'security' and click on the green tick detailed 'Trusted sites'. Then select 'Sites' underneath.
3. Enter the URL for the outlook plug-in, but allow tick the box underneath which states: Require server verification (https:) for all sites in this zone. Then select 'add'.
4. Download plug-in once more, this time it should work!

**A visual userguide is also available for both of the above browsers upon request.**



# Working Together

## The importance of effective communication within your business and how SENRO can help .....

**Effective communication is an essential part of a smoothly run business organisation as it provides an essential link between the people who make up the organisation.**

Communication involves the transition of information from a source to receivers. The information is of course communicated in the form of a message or point of reference.

In the modern organisation, and of course for ourselves working within the financial industry, there will be multi-channel flows of communication. For example, a referral may be input into your SENRO system by an introducer user which is then picked up by a system administrator. That administrator may then be required to validate the lead and obtain further information before it is then allocated to an adviser to action. The adviser may then need to make an appointment with the lead and also send additional communications to them such as a welcome pack and appointment confirmation email. Of course, they will need to update the administrator and the introducer on their progress with that lead.

SENRO provides you with the opportunity to send a multitude of communications through various forms of media, and through using your Notes and Activities screens and communication tools it could not be easier to send both internal and external communications.

Through SENRO you are able to send email messages, SMS messages and internal messages, along with the ability to create calendar events and sync to Outlook, share calendars with other users and update clients, prospect and case files with notes to keep all parties updated as required.

Through using effective communication for the above scenario, you can provide the opportunity to colleagues, and also improve your own efficiency to turn that lead into a sale.

The SENRO appointment calendar allows users to review both your and your team's schedule. Should a lead come through to your office, a colleague could check your schedule, create an appointment on your behalf and update you through a quick SMS or internal message through the system. As SENRO offers 2 way Outlook integration you have the benefit of keeping both your Outlook and any PDA's updated.

The nice thing is that of course SENRO will already hold data on your prospect, client or case. For many forms of communication you are able to utilise within your SENRO system, tools are provided to remove any need to rekey information. And as SENRO contains all the tools that you may need within your business, everything that you require is immediately at your disposal such as documents, and any other additional

information you may require. E.g. should you associate a client to your appointment within the calendar, SENRO will pre-populate any address and contact details you may need to have for that client.

Of course, advisers rely on face to face interactions with their clients. But with your SENRO system being available online, and through effective communication, tasks and chases could be created for those users at the office to complete anything required of them. A prompt, efficient service will not only impress you client but could also speed up the whole application process improving business turnaround.

According to many resources, the lack of effective communication within a business can lead to decreased productivity and serve as an obstacle to a businesses performance.

Effective communication eliminates the questions and confusion that may cause delays due to the need for further clarification.

Through creating a rich source of data within your SENRO system and utilising the many communication tools you have to hand we can assist you in creating a successful and profitable 2013.

**For more information on this subject please contact Sarah King sarah.king@keepergroup.com**

# Bulk Change

## What is it for and how do I use it?

All SENRO clients have recently benefitted from a recent enhancement to your systems called 'Bulk Change', but you may be wondering what it is for and how do you use it?

Bulk Change can be accessed through the management Section of SENRO and can be used for changing your clients rating, adviser, administrator and status in bulk.

For example, should an adviser leave your business, and you need to re-allocate their clients to one or more alternative advisers, instead of needing to go into each individual users profile and change this manually, you can now change them in bulk using this tool.

Due to the sensitive nature of what this feature can do, we have restricted access to this feature to users who are not set as 'Practice Principle'.

If you do require a user to have access to bulk change, you will need to either change your access profiles which again, are contained under management or, go into the individuals user profile and select bulk change within their navigation controls.

In September 2012's issue of SENRO News, we detailed how SENRO can assist you with the oncoming changes required by RDR.

Using SENRO's marketing search tools, you are able to segment your clients based on their product criteria. These clients will now of course be subject to different service level agreements set out by your business.

For example, you could run a search on clients who have an investment policy over a certain value. These may be then grouped as 'B' rated clients within bulk change.

For more information on this feature, please contact SENRO support on 01275 400660.

The SENRO userguide are also available online by selecting the 'user guide' icon on the bottom right hand corner of your SENRO screen.

## This Month's Q&A Technology Tips

**Q: When creating a 'joint' client letter, SENRO creates two separate letters addressed to the clients individually instead of the one intended addressed to both, why is this?**

A: Under 'Personal Details' within your clients profile there is a section called 'addresses'. This section details and allows you to record all current and previous address details associated with your clients along with correspondence controls around them.

There are three tick boxes available against each address; current,



correspondence and link to partner.

You need to ensure that 'correspondence address' is ticked along with 'link to partner' to ensure that this address is shared between them and the same.

If the correspondence address differs between partners SENRO will generate two separate letters even if 'joint communication' is selected.

When clients who are linked as partners share the same correspondence address and you chose to create a joint communication, one single letter will be created and addressed to both of them.



SENRO  
THE FINANCIAL SERVICES ENGINE



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## We want to hear from you!

**Do you have any feedback on any of the articles contained within SENRO News?  
Are you or your business involved in an exciting event that you would like us to promote?  
Do you have any feedback in relation to your SENRO system?  
Do you have an article you would like to see included?**

**We want to provide you, our clients, with the opportunity to be involved with SENRO News.**

If any of the above is of interest, please contact Sarah King [sarah.king@ekeepergroup.com](mailto:sarah.king@ekeepergroup.com)