

The **survival guide** for **financial services**



SOLUTION4
THE FINANCIAL SERVICES ENGINE



Solving the challenges faced by Mortgage and Financial Advisers everyday.

Every business needs the right management, marketing, recruitment and training support to survive as a business in a difficult market.

Solution4 is a fresh approach created by industry experts who have recognised the difficulties and provided the answers, offering 4 unique solutions that support everyday business needs to ensure your survival and success.

SENRO Management

Increase your profitability by managing your client information using our online CRM and document storage database.

CHROMA Marketing

Create the right image for your company using our marketing and web design experts who truly understand your industry.

GLOW Recruitment

Find the right team that will help drive your business forward using our free online solution to financial recruitment.

SOS Development

Get help from our team of expert consultants to grow and develop your business with online training, coaching and administration support.



There are **5 steps to success** in Financial Services, which requires a single database to enable each step to seamlessly flow from one to the next.

SENRO is the leading client and business management system that provides the full solution for efficient and effective business management. As the market changes, **SENRO** gives you the right tools to get ahead of the competition.

1. Manage your leads

The foundation of your business is your leads. SENRO tracks every lead and provides a report on the lead generation, communication and success giving you the right information to analyse conversion rates and performance.

2. Collecting client information

A client record management system needs to be simple to use but informative and a powerful sales tool. SENRO is the latest technology providing comprehensive but user-friendly relationship management software, with electronic fact finds and wealth management reports it's the ideal solution for maximising business opportunities.

3. Track your pipeline

New applications need to be nurtured from sign up to completion or issue. SENRO provides full pipeline management on all ongoing business, including mortgages, protection, insurance, pension and investment sales giving you the tools to ensure business is processed in the fastest and most efficient way possible.

4. Reconcile your commissions

Every business needs to understand their financial position to manage their cash-flow and analyse their performance. SENRO automatically calculates commission payments and provides every report a business will need, from product spread, to reconciliation and debt management.

5. Follow up your clients

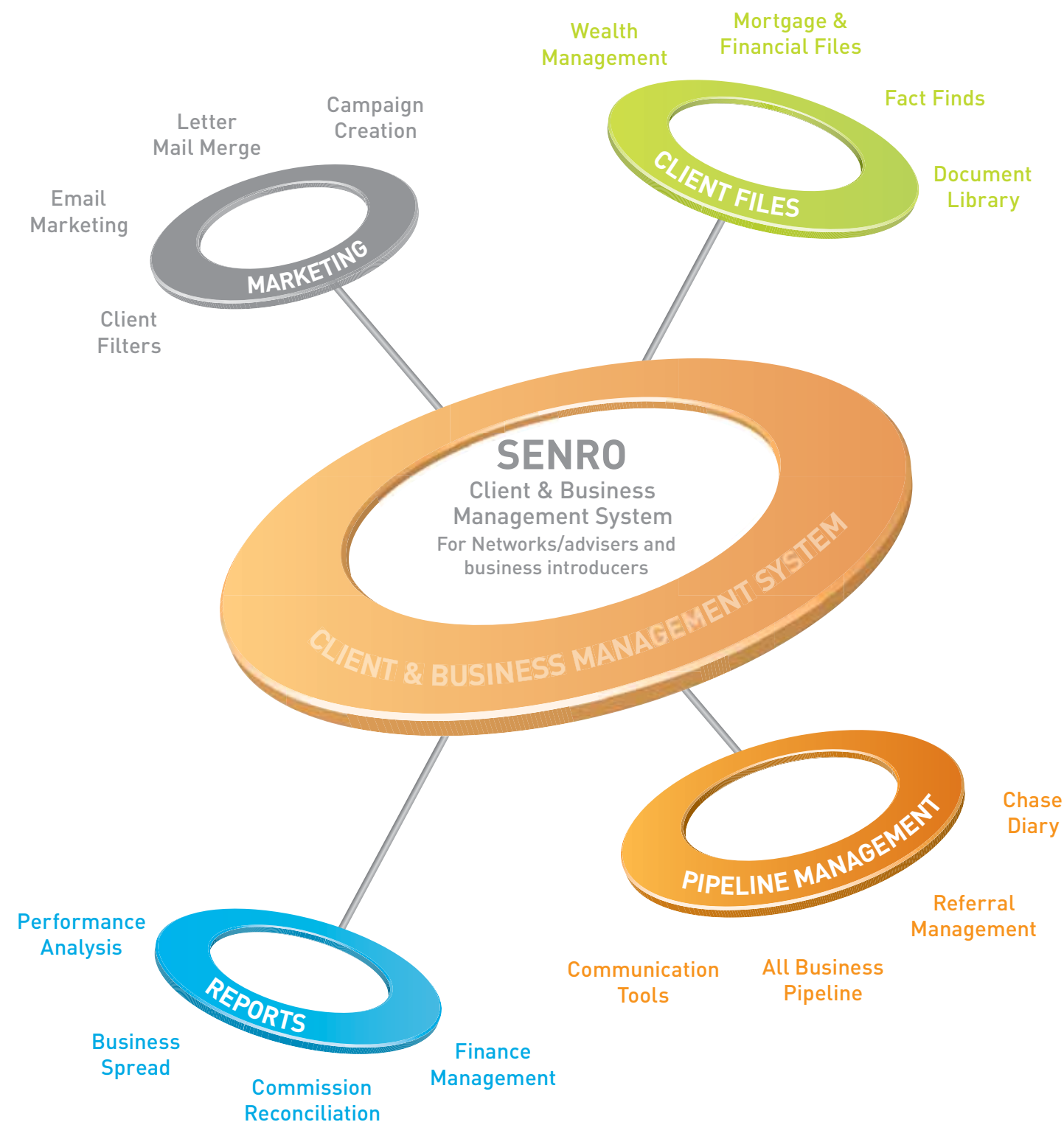
Your existing clients are your most valuable asset. SENRO will help you maximise on every new business opportunity by maintaining a good relationship with your client bank through personalised marketing campaigns and review diary management.

SENRO



SENRO
SOS
CHROMA
GLOW

We believe the right technology should manage all your systems and processes, creating a single data warehouse for all your business needs.



SOS



SENRO
SOS
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Every business needs to understand the importance of managing change, nurturing talent and maximising growth opportunities.

If you want to structure your company's growth, alleviate the pressure of administration or receive guidance and support on how to be a successful adviser, then **SOS** can help you.

SOS is a team of consultants, trainers and administrators, giving you access to industry professionals who can help guide, train and support you and your team.

- Training courses for new recruits
- On-going development
- Training needs analysis
- Keynote presentations
- Business growth planning
- Commission and finance structuring

Exclusive services for SENRO members

- Remote administration support
- Monthly commission reconciliation

CHROMA



SENRO
SOS
CHROMA
GLOW

Making sure your company is presented in the professional light it deserves requires marketing experts that really understand your industry.

CHROMA is a service provided by Solution4 that enables brokers to benefit from our wealth of experience in the financial industry, marketing and technology.

Our dynamic and forward thinking team includes graphic designers, advisers, web-developers, copywriters and skilled marketing professionals. Together they deliver an experienced and professional end to end service for mortgage and financial advisers, providing marketing solutions and packages with flexible payment terms that enables every business to implement a marketing strategy.

- Marketing packages
- Logo and branding
- Website design and development
- Brochures and leaflets
- Email marketing
- Stationery packs



People may be your biggest asset but finding them can also prove to be your greatest challenge. Worse still, it can prove to be very costly once you incorporate expensive recruitment fees.

GLOW replaces the traditional methods of recruitment for forward thinking individuals, committed to developing career opportunities in Financial Services.

Solution4 have used their industry knowledge and experience to develop a free online recruitment site that matches candidates and employers. A simple and easy-to-use registration process determines the industry experience, qualifications and expectations of both parties, helping match the perfect candidate to your role.

- Free employer registration
- Free candidate registration
- Easy to use
- Job application tracking
- Resumé upload
- Automated email service

SOLUTION4

SENROCHROMAGLOW SOS

Sales Process

Client Management

Pipeline Management

Performance Analysis Mail Merge

Website Branding Logo Design

Marketing Copywriting

Easy Registration

Resumé Upload

Free Job Postings Online Recruitment

Application Tracking

Business Planning Commission

Accounting Services

Training Support Remote Administration

Reconciliation



www.solution4.co.uk