

## Don't pay a high price for poor promotions

Effective communication with customers is critical to a successful business and the methods to do so are many and varied

The consequences of misleading promotions can be significant. If your advertising material fails to be 'clear, fair and not misleading', you are at risk of your clients making a very important decision without the best information. This mistake may not come to light for a number of years and can lead to unhappy outcomes for both clients and firms.

In all cases, it is critical that these communications are not only attractive and effective in marketing terms but legally and technically correct, fair and compliant with regulation.

The internal approval of customer facing literature can be a laborious and time consuming process. These inefficiencies in the process can lead to 'corner cutting' and policy being ignored when it comes to releasing time sensitive communications.

Insight Financial Promotions helps you to deliver compliant outcomes every time, efficiently and at low cost. The system supports the review and authorisation of Financial Promotions material through the creation of an electronic case, which can be reviewed and amended by many areas of the business at the same time.

Using Insight Financial Promotions items are created, reviewed and authorized via electronic processes, with opportunity to add audited comments or queries to each version prior to release. When the case is authorised for release a complete audit trail remains, providing a process that is electronic, effective and fast.

Electronic dashboards can highlight early warnings of promotions set to expire or overdue tasks holding up the process. Desktop reviews or analysis by firm, theme or staff member can be easily achieved using the sophisticated MI tools.

### Key Features

- Auditable means of approving and authorising promotions
- Mass communications case creation
- Attach relevant documents to each case
- Choose recipients for electronic case review
- Originator notified electronically when case review is complete
- Historical versions of promotions are stored
- Specify end and future review dates
- Key information recorded
- Workflow defined stages and statuses
- Export facility

### Key Benefits

- Protects against regulatory breaches
- Ensures consistent messages
- TCF Principles addressed
- Workflow driven to support effective and efficient processes
- Integrates with other systems or standalone
- Dashboard and management information
- Auditable and compliant