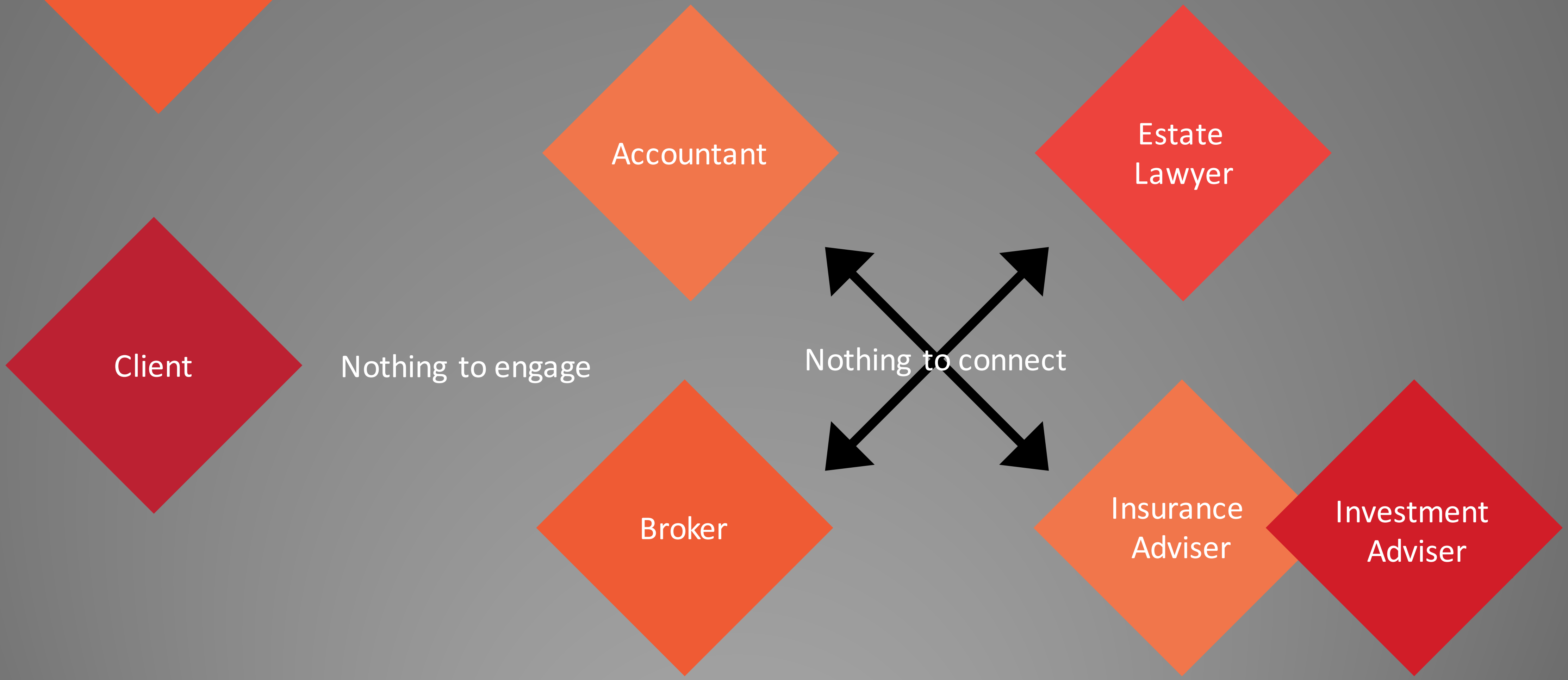
CONNECTION ENGINE

Product Overview

How hard is it to

- Generate Referrals?
- Track Results?
- Measure Improvement?
- Communicate with partners?

The problem


Accountant
Estate Lawyer
Client
Nothing to engage
Nothing to connect
Broker
Insurance Adviser
Investment Adviser

CONNECTION ENGINE

Engage people, Connect Professionals, Measure Results

What Connection Engine Does for Australians

Engage Australians by measuring 5 critical factors of financial health. Legal, Debt, Protection, Investment, Cash flow

How it works

Engage Australians

Connect to solutions

Track results

Provide Analytics

Our brands

MY FINANCIAL FITNESS

Consumer (B2C) Brand
Seen on client collateral
Co-branded with the your business.
Provides facts and insights – not general advice
Not monetized (reasonable limit to sending questionnaires but no cost per questionnaire)

Intention:
Promote financial fitness, "gamify" financial services
Position professional advice as the solution.

CONNECTION ENGINE

Adviser/Partner (B2B) Brand
Seen on adviser/partner collateral
Potential for co-branding with licensees.
Provides workflow reporting
Monetised – paid by an annual subscription per adviser

Intention:
Promote better reporting and more referrals

Reporting

Each report category can be generated over a specific timeframe, stage or health type. Reporting can also be generated at an adviser, practice, licensee or industry level.

Type	Data
Client health	Score by client, health type or time point.
Referral status	Client list by stage (questionnaire, first, second, implementing, won, lost)
Productivity	Referrals by partner or by partner group over time (eg 1 month, 3 months 12 months)
Productivity	Adviser conversion per stage and final conversion
Productivity	Pipeline report, list of clients by stage and expected revenue.
Productivity	Forecast report – automatically generated based on cycle time, staging and pipeline.
Revenue	Forecast to actual revenue over time by planner, partner or partner group
Client experience	Total cycle time per referral per health type.

Competitors

Name	Cost	Health Check	Adviser Branded	Referral tracking	Reporting Function
!	$6,000 per annum + cost per quiz per month if above 50 quizzes sent	Wealth, insurance, super, cash flow	yes	no	Client take up of report only
!	$750 per annum	Estate checklist	no	no	Client take up
!	$120 per referral partner additional cost to a $5,000 financial planning tool.	no	no	Yes - simple	Pipeline tracking
MoneySmart.Gov	$0	Super, Insurance and budget	no	no	no
Connection Engine	**$1200 per annum Or $120 per month**	**Estate, Insurance, Debt, Cashflow, Investment, SMSF, Business Insurance,**	**yes**	**Yes – comprehensive**	**Cycle time. Client health, review date, referral partner productivity, planner productivity.**

Features

Health Check	Client Connection	Partner Connection	Workflow	Analytics
Co-branded with "My Financial Fitness" and your logo and colors.	Clients are invited one off or on bulk	Up to 3 partner licenses are included.	Track and report back to all parties on the financial health of clients	Analyze referral partner performance
Qualitative questionnaire with scores based on clients knowledge and engagement of their affairs not just numbers.	Diary integration – clients can book straight in to their advisers diary or request a preferred time.	Partner licenses are per business meaning an entire business is a partner not just one accountant or one broker.	Record a pipeline and track clients through the advice process	Record point to point financial health of the clients demonstrating the before and after of advice.
Addresses estate planning, cashflow, debt, insurance, superannuation, SMSF, Business Insurance.	Automated reminders to help people address their goals and annual review reminders.	Track revenue, conversion, productivity per partner or per individual referral partner.	Upload and store documents providing an easy way for partners to load additional documents.	Analyze planer productivity, cycle times, conversion and forecast production per planner.

Our goal: provide a service that connects professional service providers to improve the client experience.

Help Advisers dramatically improve their productivity, gain insights into conversion and cycle times and drive better decision making.

Help more Australians access professional advice and demonstrate the improvement by tracking and reporting on financial health.