



CRM functionality enhances lifePAC

Contact management facilities which previously required a stand-alone system have now been integrated into FIT's lifePAC and the first client to operate this is Nottingham Friendly Society.

Details of potential Agents are entered directly into lifePAC so that contact and correspondence can be logged and managed. An *Agent Status* setting, and the list of documents which must be provided before an Agent is accepted, can be used to manage the processing of any Proposals from the Agent pending full approval.

Details of potential Customers are entered directly into lifePAC, and from there Quotations and Illustrations can be generated. If a Quotation is accepted, it can easily be converted into a Proposal and on to an active Policy.

There are provisions for Reminders, free-text Diary Notes and user-defined Procedures. An extract facility allows the selection of Agents or Policies with the results either being automatically loaded into an *Excel*® Spreadsheet or used in *Word*® to create a mail-shot.

lifePAC features automatic Chase/Follow-up letters and Reminders.

lifePAC clients benefit from the integrated Customer and Agent relationship management.

All these features are automatically included within the general release of lifePAC.

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