



# Online solutions

**threesixty uses its website as a complete online resource offering its customers both training and advice in one added-value service**

**AWARE THAT ADVISERS** want to spend as much time with clients as possible, three-sixty has made the provision of web-based solutions, including training, a priority. The website is to be relaunched in July. Its latest incarnation will see an even wider range of services and improved ease of navigation. The website is now a complete online resource for training and advice.

The group's client-only website is fast becoming the principal method of delivering a wide range of documentation. All

individuals within three-sixty's client firms are provided with login details on request and take-up exceeds 90%.

three-sixty uses its website to deliver the weekly client newsletter and any supporting documentation. It is also the preferred method for booking places at the key issue seminar workshops and, as the relaunch progresses, three-sixty will be offering advisers the opportunity to download presentations used at these workshops if they were unable to attend in person.





## Each download has significant and appropriate detail for the busy adviser

Additional workshops, designed for smaller audiences and covering, for example, investment excellence and equity release are also promoted and administered via the website.

threesixty also uses its website to provide useful information to clients. For example, they can download the guides that the group has produced. These comprehensive documents cover areas such as Finance Bill Update on Taxation and Trusts in April this year, Budget summaries, A-Day and Inheritance Tax guides. These are all designed to assist the development of advisers in key areas of business.

The bulk of threesixty's compliance manual, suitability letter templates, standard documentation and product research listings can also be downloaded from the site or used online.

It is also possible for principals to use the website to monitor production, KPIs or CPD logs for their RIs to help maintain accurate information and measure the success of their businesses.

The website enables all clients to access up-to-date information at the touch of a button. They do not have to waste time ordering leaflets over the phone. threesixty's online solutions also save the clients time. It does the research for clients and all they have to do is download the completed documents.

Each download has significant and appropriate detail for the busy adviser. It is these added-value services that have helped threesixty build its reputation of providing excellent service to clients.

[www.realadviser.co.uk](http://www.realadviser.co.uk)

## Recipe for success

### The threesixty faculty helps staff achieve FPC qualification

**AT THE END** of last year, threesixty commissioned independent research to identify what factors made its client firms successful. This research work showed enormous differences between the firms, but also identified a number of common factors for success.

One of the most important factors identified by the research was the key advantage of properly qualified administrative staff. It showed a general agreement among the leading companies that FPC-qualified administrative staff more than justified their additional salary by providing compliance, research and report-writing services to advisers.

From the research, threesixty wanted to identify ways to help its client firms develop. Helping all staff to achieve FPC qualification therefore seemed an obvious place to start. In consultation with a number of its client firms, threesixty launched the 'threesixty faculty' in January 2006.

The faculty is designed to assist all levels of staff to obtain either the Certificate in Financial Planning (Cert FP) or the Certificate for Financial Advisers (CeFA) qualification.

The faculty follows a series of steps:

1. Candidates obtain relevant

course book from the CII/IFS, with a discount available through threesixty on all CII books

2. Candidates read course book to obtain basic level of knowledge and then register for faculty by email.

3. Candidates have access to a series of workbooks, which set out the key points from the course book with explanation and relevant tests.

4. If candidates have any questions or queries as they go through the workbooks, they will be able to submit questions/queries to a dedicated email address. Threesixty will respond within two working days. This response may be by telephone if a clearer explanation is required.

5. Prior to sitting the examination, candidates will sit a mock examination. This will be marked and a detailed review, including revision needs, will be provided.

Threesixty launched the faculty with the CF1/CeFA1 course in order to assess demand and ensure that the systems worked. It has now added CF2, CF3, CF4 and CF5. CF6 is about to be added. There is a minimal cost of £75 per candidate, per course, payable once registration has been confirmed.



# A team effort

Using workshops and seminars, threesixty keeps in close contact with its client firms

**THREESIXTY'S MAIN AIM** is maximising the profitability of its client firms. This is either through the group's core service of risk mitigation, which reduces the cost of PII and also the risk of costly claims and/or regulatory fines, or through the provision of business development support.

The group's approach to business development has evolved over the three years since its inception and will continue to evolve to meet new challenges and seize new opportunities.

At the end of last year, threesixty commissioned an independent review of a number of its client firms with a view to identifying the key factors which have contributed to their success. That review led to the creation of the threesixty faculty and has also prompted the launch of other services.

Direct contact with the principals of client

firms is crucial to threesixty's process. To that effect, it has created a programme of quarterly meetings – its 'State of the Nation' forums. Like its monthly Key Issue Seminars, these are small, interactive meetings with 10 to 20 attendees. Threesixty holds them in different regions and usually has eight or nine meetings each quarter. Only principals are invited to these meetings.

Much of threesixty's business development work is done at these meetings. Firstly, the group identifies any regulatory issues likely to affect client firms in the next six months. These are covered in as much detail as is practical (the regulator sometimes restricts how much information can be provided). Threesixty will then identify how it will help firms meet these challenges. There is then an open discussion about how these measures will affect the specific client firms at the meeting. As a result of these meetings, threesixty is able to assist its client firms in preparing their menus and even in submitting their RMAR returns

The session is followed by a business development session. These are generic because workshops are not the ideal place to discuss the finances of specific client firms. Recent meetings, for example, have covered the need for effective business plans, how to create them and how to implement them. They have also looked at marketing plans, the transition to fee-based advice among many other subjects.

Following the workshop sessions, threesixty's client firms are able to request individual sessions, on-site, with its business development team.

## Threesixty's main aim is maximising the profitability of its client firms

