

Illustrations Case Study

Merrill Profile

- Serving 16,000 Merrill financial advisors
- Replacing existing product suite with new suite
- Competing with dozens of other non-proprietary annuity products
- Needed a flexible tool that could effectively drive sales

Business Problem

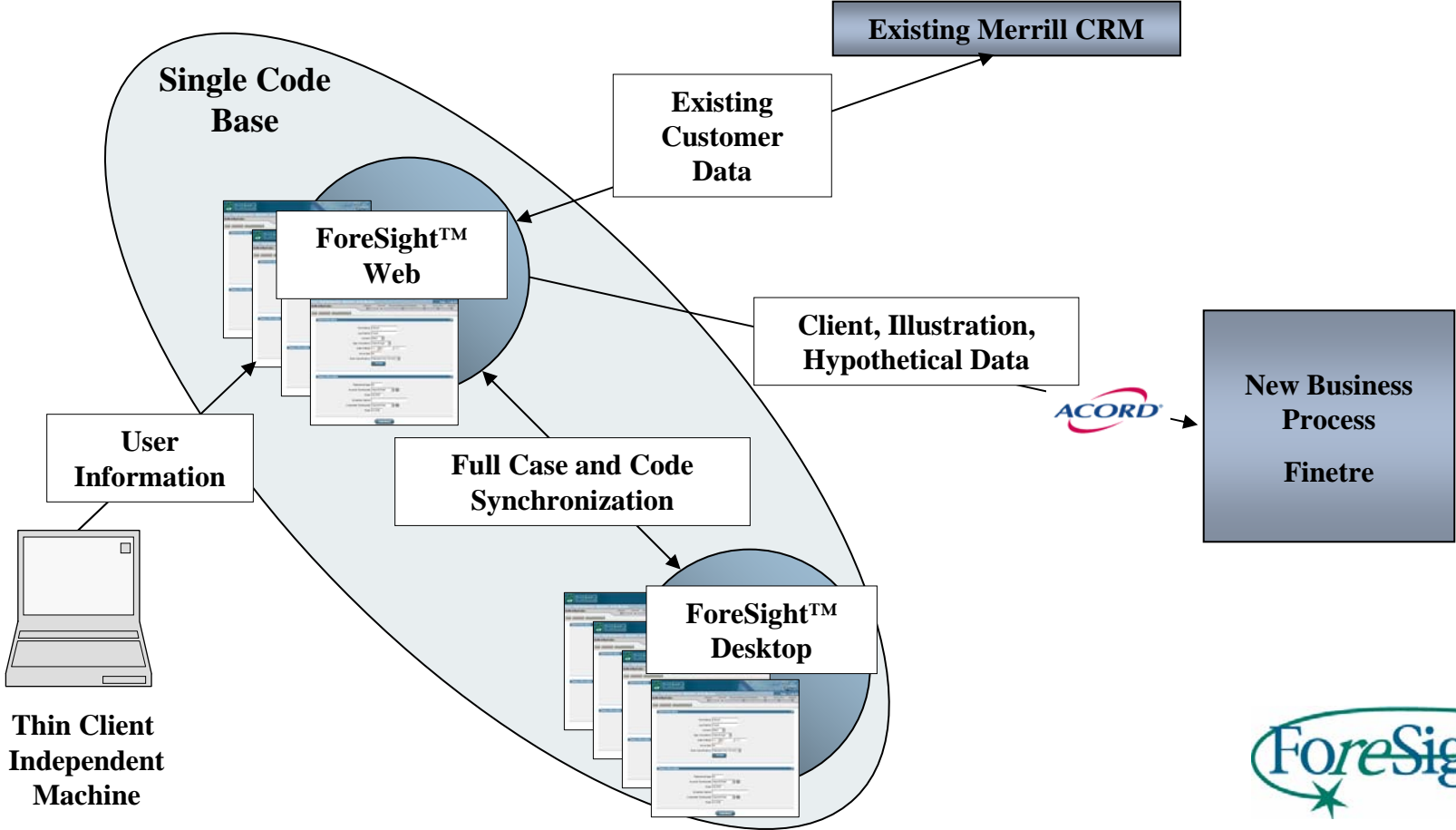
- Losing proprietary market share
- Needed a better way to show the benefits/features of the new product suite.
- Field and home office personnel with varying levels of VA knowledge needed to use the system.
- Need to satisfy stringent legal and compliance requirements.
- Did not have a view into how reps use selling tools.
- Compatibility with other internal systems was a non-negotiable business requirement.
- Must develop a flexible and customizable selling tool to help the sales force.

Implementation Overview

- Web and desktop implementation with one set of code – Case and code synchronization
- Accumulation and payout annuity products.
- One stop shop with links into marketing material and other resources including automatic pitch book selections
- Entry wizards, preset sales strategies and full custom illustrations/proposals.
- Automatic link into the order entry system.



Integration Overview



Conclusions

- ForeSight™ Mobility gives us the option of delivering functionality both to the desktop user as well as to the web only user
- Providing usable sales stories can reduce compliance concerns and improve sales appropriateness
- Integration using ACORD standards significantly enhance the user experience.
- Wizards can reduce product training and improve product understanding while being more efficient for the rep
- Illustrations and creative output allow you to deliver your value proposition to *your* customer.

Questions