

“ LET’S TALK ABOUT
ALWAYS CREATING
VALUED INVESTMENT
VEHICLES. ”



Business *can* be simple



When it comes to investing one's finances, professionalism and confidentiality are critical to building a strong, trusting relationship. The banking industry's dynamic pace requires financial planners to deliver accurate updates quickly and professionally. Likewise, the fast, secured processing of massive amounts of confidential personal information and delivering professional looking contracts to customers underscore the public's faith in the insurance industry.

Let's talk about how Canon's document management solutions can overcome these challenges.



THE FASTER WAY TO CREATE AN ACCURATE, UP-TO-DATE PITCH BOOK

Preparing professional looking pitch books with up-to-date market data to advise on investment vehicles to prospective clients is currently a time-consuming and tedious process that an investment banker simply cannot afford. The process is plagued by erratic financial data resulting in numerous, last minute data updates often delaying the job. In addition, finalising the finishing requirements and printing cost between the banker and the reprographics department is a difficult process. Often, the banker is not updated on status of the job and costs involved until much later. The inaccuracies of charge back result in disputes.

We can help.

Canon's web-to-print business application enables the user to submit a pitch book request via its user-friendly desktop application. To create a pitch book, the banker can upload all raw data and images with the option of an array of templates or layout formats. These predefined templates make for an easy pitch book creation that is close to the banker's requirements. A pitch book ticket will be issued allowing the banker to track the job remotely and its estimated costs, making the invoicing process a transparent, accurate one. A draft layout is then sent to the banker for approval. High-speed printing allows for faster turnaround time and any last minute changes. Once approved with the selected finishing, the pitch book is sent to print as requested. The job is then archived into the database for future reprinting if required. A professional looking document leaves a lasting impression on clients that ultimately evolves into repeat business.

Benefits at a glance:

- Increased convenience with user-friendly desktop application
- Eliminate miscommunication with available templates and option to preview
- Faster turnaround with high-speed printing
- Improved flexibility accommodating last minute updates or changes to book creation
- Transparent costings for charge back to banker
- Enable remote tracking of job status
- Save time and effort when creating pitch books



Pitch Book Creation Process Now Simplified



- Web-to-print desktop application:
- Job submission
 - Upload raw data and images
 - Job ticket
 - Cost estimation of job



- Job assembly
- Preview
- Editing
- Proofing

Review and approve



Investment banker



Printing and finishing



- Hardcopy print delivered to investment banker
- Accounting and costs charged back to banker



A softcopy of job is archived into database for future reprints

SEAMLESS MANAGEMENT OF INSURANCE CONTRACTS

Currently, when processing an insurance case, agents need to submit the original insurance contracts, such as fact-finding sales illustrations, completed application forms, confidential reports and bank direct debit forms, to the branch office. Administrative staff will then key in the information into the mainframe system as well as make a photocopy of the documents for filing. In addition to the time-consuming, labour-intensive manual filing, hardcopy documents need to be kept for a period of time, taking up expensive office space and increasing stationery costs.

Next, these case documents will be couriered to the Headquarters (HQ) for the underwriter to vet and approve. In the meantime, should any enquiry about an account occur at the branch office, administrative staff need to manually retrieve customer insurance contracts from the office cabinets which can be a slow and tedious process.

We can help.

Canon's scan-to-file solution enables administrative staff to simply scan the original insurance contracts, regardless of the volume, and store them as digital files in a centralised document management system. This facilitates easy network sharing and access plus the easy search function for retrieving customers' insurance contracts makes responding to account enquiries an effortless job. An audit trail is possible, if required.

Benefits at a glance:

- Save office space
- Faster retrieval of customer insurance contracts by improving productivity
- Improved security with fewer incidences of misplaced contracts
- Faster network access of insurance contracts to speed up the sales administrative process
- Save on daily courier costs and time
- Save stationery and photocopying costs



Branch Office Filing of Insurance Contracts Now Simplified

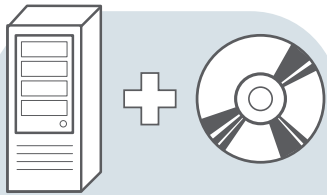


Agent processes a case with key documents:

- Fact-finding sales illustrations
- Application form
- Direct debit form



Branch administrative staff keys in basic information and scans insurance contracts



Back-up



Electronic filing in centralised document management system



Agent/Branch administrative staff can access files remotely for any customer account enquiry

MANAGING THE CREATION OF INSURANCE CONTRACTS DIGITALLY

Upon approval from the HQ's underwriters, a set of original insurance contracts need to be photocopied, manually assembled and bound together with a set of relevant hardcopy terms and conditions together with a set of the contract (printed from the HQ's mainframe) before sending it to the customer. A simple human error will mean a tedious re-assembling of the contract.

The original set of documents are then filed, bar-coded with the policy number and sent to the warehouse to be stored. Beyond the excessive photocopying of insurance contracts, massive storage space is required to house hardcopy duplicates. Retrieval is also tedious and slow.

We can help.

Canon's centralised document management system can organise all varying policies, terms and conditions as digital files in the system for quick and easy retrieval to print only when required. Used in conjunction with Canon's publishing software, HQ administrative staff can digitally merge scanned customer insurance application forms with the corresponding terms and conditions and the contract from the mainframe as one complete contract document. These are then converted into PDF format and stored in the document management or backend system. Branch offices can then access all these remotely right from their desktops, for fast retrieval and printing of contracts only when required or necessary.

Benefits at a glance:

- Save stationery costs by reducing the need for excessive photocopying
- Cut costs by reducing wastage of outdated pre-printed policy terms and conditions
- Save on physical storage space, freeing up expensive office space
- Minimise human errors in contract assembly and improve accuracy with softcopy preview
- Improved customer service through faster turnaround time in contract preparation
- Save manpower costs by reducing the manual administrative process



Creation of Insurance Contracts Now Simplified

Underwriter approves the case



Scanned original insurance contracts retrieved from centralised document management system



Softcopy of relevant terms and conditions retrieved from document management system



Mainframe generates PDF of contract



Print and bind final version of contract



Software merges all softcopy documents with publishing solutions to create professional looking contracts



PDF contracts are created and archived into mainframe system for future retrieval



Contract delivered to customer



With Canon's customised solutions, business can be simple. You can streamline your document workflow processes to ensure a smoother, more productive, highly effective business for better growth, stronger sales and increased profits. Let's talk today.

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For creating professional pitch books and insurance contracts,
visit us at www.businesscanbesimple.biz

Canon

Delighting You Always