

FINANCIAL ADVICE

The sales enablement solution for your business channel

Achieve better & predictable results,
by adding algorithm-based content to
online meetings.

From first inquiry, through clarifying your customer's needs,
to signing the contract: Idiligo guides you through the entire online
financial advisory process, ensuring that it is compliant with
regulatory requirements.

THE BENEFITS

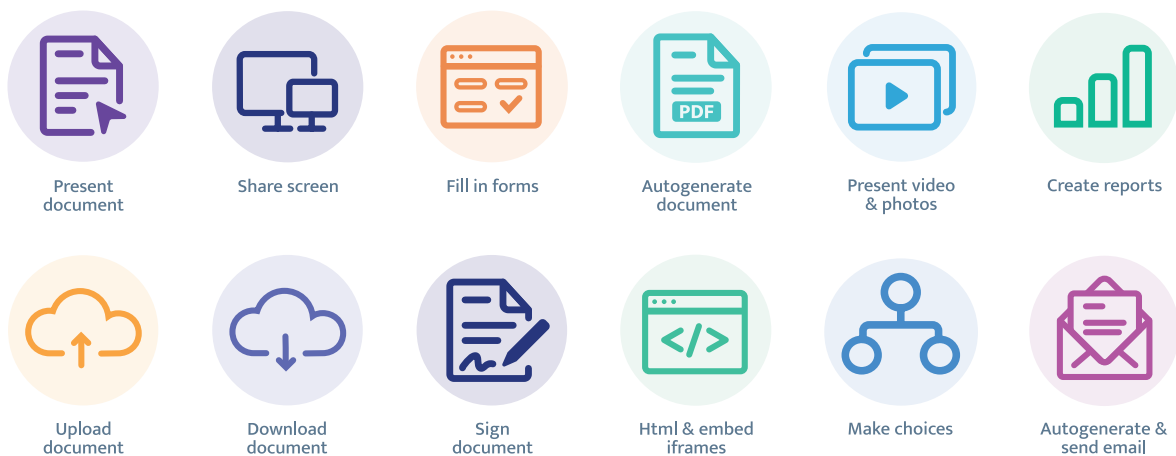
- ✓ Focused & targeted meetings thanks to a predefined online meeting process / no side agreements
- ✓ Flexibility through the choice feature (e.g. choice of the financial product)
- ✓ Online presentation of financial information, contracts or tariff calculators
- ✓ Collect customer data and fill in forms
- ✓ Upload and download of documents (e.g. contracts or ID card of the customer)
- ✓ Time savings & increased closure rates through immediate online contract signing
- ✓ Security through legally secure online signature & customer calls that comply with specifications

HOW TO CREATE YOUR INDIVIDUAL ONLINE MEETING

1 Think about your financial advice meeting

Think about how your financial advice meetings usually work. What is important and what can be left out? Which new topics should be added? Then consider how you would like to conduct the online meetings with your customers in the future. Where is a rigid process required, and where are choices for the further course of the online meeting necessary?

2 Choose, which meeting features you need



3 Bring the features in the right order: the online meeting script

