

How to maximise client face to face time?

For any professional services firm the objective is to maximise time spent with clients as a natural route to increasing revenue. Where advisers also have to create and document the client solution this goal can be compromised.

The solution is to distinguish between client advice and the para planning process and the sector trend is for more back up resource per client facing professional.

The next question is between in and outsourcing. Some firms employ full time para planning resource in house. Others seek to outsource this service.

Adviser Home has partnered with a leading para planning firm PPOL Ltd and arranged valuable discounts for both their full Para Planning service and the PPOL Ltd report writing soft ware. Which service suits you best is a matter of style and preference and you can talk to PPOL Ltd to help you decide which route to go.

Both services will allow you to:-

- Speed up business processing
- Spend more time with clients
- Minimise employment costs and risk
- Streamline your compliance process

The Suitability Report Writing Software lets you:-

- Spend less time writing suitability reports and more time in-front of clients
- Write professional suitability reports in minutes not hours!
- Suitability reports should always be up-to-date and TCF 'friendly' – Here's how!
- The most user friendly and tailorable suitability report builder available

Paraplanning Online provide the most advanced, yet easy to use, web-based suitability report writing solution on the market today. PPOL uses 'wizard' technology that guides the user through an intelligent question and answer session that results in a compliant and professionally formatted suitability report. In addition, PPOL's unique Report Template Editor enables the content of the suitability reports to be further tailored to suit their own in-house style of advising and individual preferences.

[View demonstration video](#)

Write professional suitability reports in minutes not hours!

After watching just a couple of our **online tutorial videos**, advisers will be able to create professionally formatted and TCF 'friendly' suitability reports in a matter of minutes.

[Test drive PPOL for yourself](#)

The full paraplanning service

This offers access to industry expert report writers on a "pay as you go" basis so you are free to use the service as and when you require according to your individual requirements and business cycle.

[Click here for a menu of costs](#)

[Click here to learn more about the paraplanning process](#)

Next Steps

To speak to PPOL please call the following numbers making sure you advise you are an Adviser Home member.

PPOL software number 0845 0553278

Pay-as-you-go para planning service 01392 432760

