

COIN Business Intelligence

Take control of your business

COIN

COIN



FORWARD thinking

Do you know your business from the inside-out? Are you confident you have the information you need to help you develop its strengths and minimise or eliminate its weaknesses?

Keeping your finger on the pulse may not be enough – you need to ensure you have immediate access to the metrics that matter if you are to assess exactly what makes your business tick.

> Introducing COIN Business Intelligence

COIN Business Intelligence¹ is designed to help you analyse and manage the aspects of your business that are pivotal to its success:

- your clients – in particular your profitable clients
- the revenue you receive from the products and services you sell
- your workforce and work processes
- referrals from your business associates.

COIN Business Intelligence reveals your key business metrics, activity and revenue, and includes a sophisticated referral management system – providing the business intelligence you need to help you stay on track.

COIN Business Intelligence is an intuitive, web-based solution that keeps you plugged into your business, even when you are on the move. Integrated with COIN Office to minimise data entry duplication, it is also available as a standalone practice management tool.

> Analyse your business

Do you know the source of your new business? Which clients are profitable and which staff members are contributing most to your revenue?

Tracking revenue is critical to every business. COIN Business Intelligence offers a smart way to import and reconcile your commissions receipts, alongside comprehensive reporting, helping you to quickly identify your most and least profitable business activities.

COIN Business Intelligence Service Bureau

Collating and recording commission revenue data can be an onerous task. With multiple product providers and non-standard data formats, you very likely allocate a key resource to monitor and manage your commission revenue. Uploading large commission revenue data files can also put pressure on your IT systems.

The COIN Business Intelligence Service Bureau facility employs a dedicated team who can import your commission revenue data files into COIN Business Intelligence for you.² You will receive an exception report that highlights any unmatched payments. All you have to do is make the required corrections and resolve any exceptions using the COIN Business Intelligence reconciliation tools.

With improved revenue metrics, and less time spent on managing commissions, you and your staff have more time to concentrate on the tasks that generate profit.

> Comprehensive reporting

COIN Business Intelligence provides a range of comprehensive reports to give you in-depth information about your business. You can monitor your business at any point in time and report on:

- all your clients' details and account information
- new business
- actual versus expected revenue
- payments made to your staff members
- revenue by staff member, client, client type or segment, product provider and product.

For example, you might run a client revenue report to help you identify your most profitable client types. This enables you to target prospects that are more likely to contribute most to your profitability.

> Efficient task management

COIN Business Intelligence enables you to track and delegate tasks effectively so you achieve greater efficiency across your practice.

- Record, track and monitor all outstanding tasks across your business – a dashboard provides a clear overview of everything that needs to be done.
- View staff workloads and assign tasks quickly and efficiently.
- Encourage individual accountability and ownership of each task, ensuring nothing is overlooked.
- Tailor your work processes using COIN Business Intelligence customised workflow templates and establish a best practice approach.



Referral transparency

Empower your referral relationships and provide transparency for both your staff and your referrers with COIN Business Intelligence.

- Obtain a clear view of current, overdue and upcoming activities for each referral.
 - Assign tasks to your own staff members or external parties.
 - Eliminate the need for referrers to make follow-up calls – with access³ to COIN Business Intelligence they can easily track progress for all your mutual clients.
 - Comprehensive reporting to check current activity and monitor the success of all referrals.
 - Facilitate your compliance obligations with a record of actions taken for each referred client and a view of each client's history.
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Integrated with COIN Office

COIN Office provides flexible, scalable licensing options to suit all roles in your business. With access to financial planning capabilities⁴, Customer Relationship Management (CRM) and campaign management, plus hundreds of tools and configurable workflows, COIN Office is designed to help you maximise practice efficiency.

When integrated with COIN Office, duplicate data entry is minimised. As the single source of truth, COIN Office automatically transfers select client and product data into COIN Business Intelligence and other COIN Office modules.

COIN can also host your client data and manage a robust and secure IT infrastructure on your behalf, including automatic priority software upgrades⁵.



First-class training and ongoing support

- Your personal Training and Relationship Manager (TRM) will develop a close working relationship with you to understand your business goals.
- Our team of COIN experts are on hand to provide unlimited telephone support from 7am until 8pm (Sydney time), Monday to Friday.
- An online training library features a range of guides and video training courses, which you can complete at your own pace and in your own time.

Power your business with inside-out insight

COIN Business Intelligence is simple to add to your existing licence if you are already a COIN Office user¹. If you are new to COIN, you have the option to licence COIN Business Intelligence as a standalone practice management tool.

Discover how COIN Business Intelligence can benefit your business, call 02 8245 4000 or email coin@macquarie.com to arrange a demo now.

Visit macquarie.com.au/coin to learn more about COIN's software solutions.



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¹ COIN Business Intelligence (COIN BI) is an optional module within the COIN Office software – additional licence fees and charges apply. COIN Office is a financial planning and mortgage broking software product licensed by COIN.

² Separate fees and charges may apply to the COIN BI service bureau – these fees are in addition to the COIN BI module fees.

³ When you licence the COIN BI module, you can request, for an additional fee, 'referrer' user licences which you will then be able to allocate to your referrers enabling them to access COIN BI. It is your responsibility to ensure that a referrer uses the COIN BI in accordance with the licence terms and conditions.

⁴ These software capabilities and tools are available through different modules or licence types of the COIN Office software and additional licence fees apply. Only Australian Financial Services Licensees will be able to obtain software licences to access these features.

⁵ COIN Hosting is a separate COIN service – additional fees and charges apply.