Business Efficiencies,
Data Quality and eValuations

Project Objective
To improve the overall quality of the client and plan data on Intelligent Office and to increase the level of automation within Intelligent Office. Our project strategy is split across two areas of Intelligent Office data management: **1. Data Quality** **2. Automated Valuations**

REVIEW ⟹ **IDENTIFY** ⟹ **RECOMMEND**

Data Quality Service Schedule	
Target Subject	**Task Objective**
Restrict inactive data	Identify active and inactive client banks and restrict inactive client data where necessary
Client segmentation	Assist business to ensure all active client data to ensure that it is segmented correctly
Client assignment	Assist business to ensure all active clients are assigned to a current adviser
Missing personal data analysis	Provide business with analysis on personal data gaps to cleanse and increase overall data quality
Bespoke Data Quality reporting	Create additional UDMI reporting to make and client data issues easily identifiable
Bulk data uploading	Provide supporting literature on how to use the iO bulk data uploader tool, to assist with inserting/updating client personal data in bulk
Provide supporting literature to maintain data	Provide supporting literature on useful reports to maintain the client data

Provide data quality recommendations	Recommendations on how to use the tools gained through the project to monitor and keep the quality of iO data consistently high. Based on an understanding of your business, provide a crib sheet tailored to your firm on what & how additional iO automation can enrich your data"

eValuations Service Schedule	
Target Subject	**Task Objective**
Plan analysis i.e. provider spread	Identify bulk and Real Time Valuation providers used to prioritise the set up and cleanse
Bulk valuation registration	Contact providers to complete bulk valuation registrations
Correct any bulk valuation data missing from iO	Ensure all bulk valuation data is matching and valuing iO plans
Bespoke valuation reporting	Create additional UDMI reporting to make and plan valuation analysis/issues easily identifiable
Unipass registration for real time valuations	Provide business with guidance on registering for real time valuations i.e. Unipass set up/additional registration steps
Real time valuation schedules	Ensure that all plans eligible for real time valuations are included in automated adviser valuation schedules
Plan agency status cleanse	Plan agency status review to suggest updates to any agency status gaps
Real Time valuation failures	Provide business with real time valuation failure analysis and recommended steps to correct any issues

Service Costs	
Service	**Rate**
Data Quality Service	£375.00 (+VAT)
eValuation Service	£POA
Improve EAdviser Index Scores	Included

We aim to keep our pricing structure as simple and transparent as possible and make every effort to keep additional costs down.

Please Note: Some project reviews may require an overnight automatch process and, therefore, may be split across more than one day.
Non remote consultancy days will incur standard travel expenses.

Circadian will use its reasonable endeavours to ensure that the agreed service standards are exceeded in the normal course of its business.

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