



**SCOLVO SALES:
MOBILE SALES
ENABLEMENT
TOOL FOR
FINANCIAL
INSTITUTIONS**

Delightful business mobile apps for sales and fieldwork processes

SCOLVO SALES: MOBILE SALES ENABLEMENT TOOL FOR FINANCIAL INSTITUTIONS

One of the most significant challenges for financial institutions in the digital age is to improve the efficiency of personal sales: the part of the process that businesses can't skip yet can't even do the way they used to anymore. Face-to-face meetings, if to-the-point and tailored to the client's needs, have the potential of closing the deals with the most extensive margins.

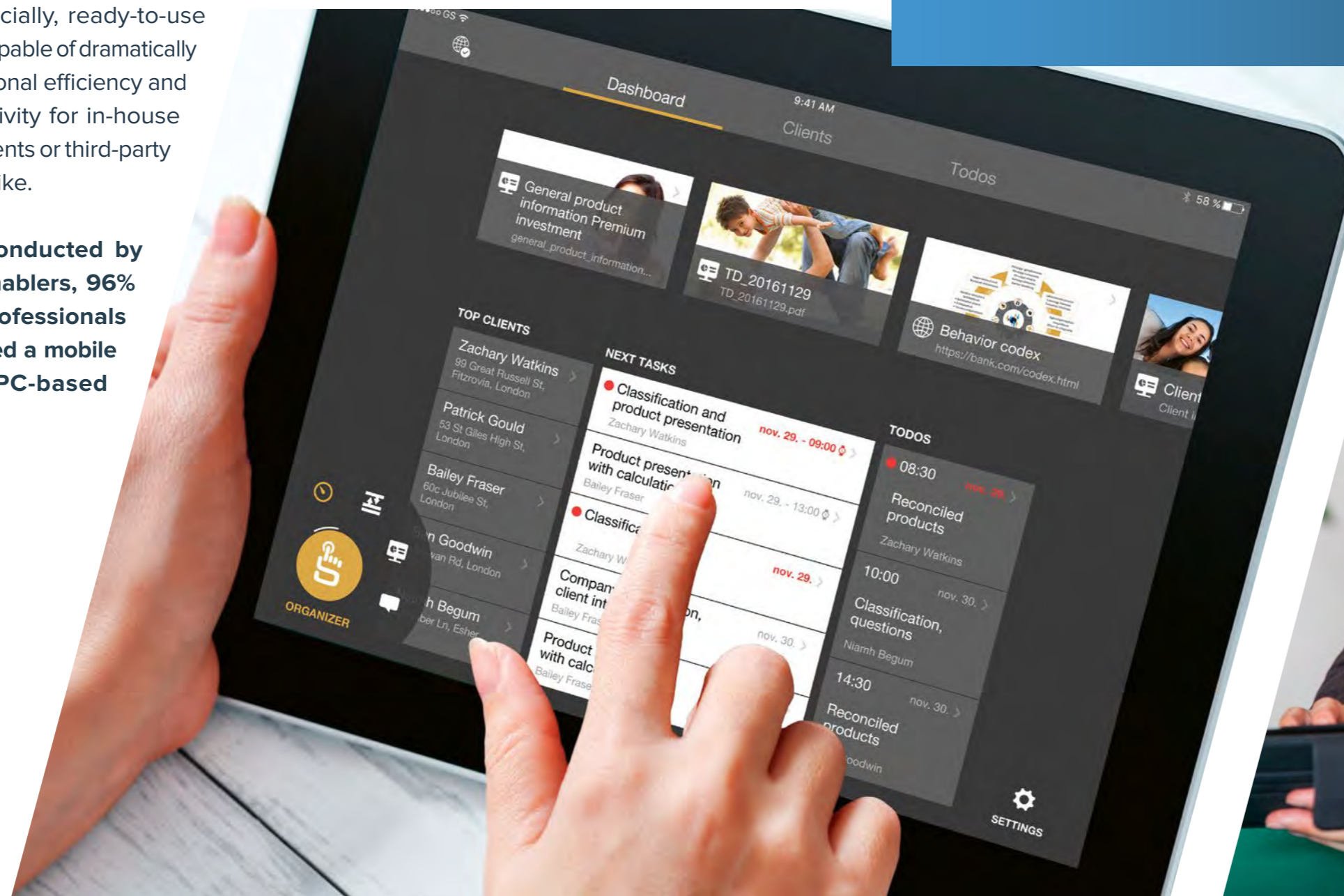
Recent studies show that sales representatives spend a whopping 650+ hours per year on searching for information and tending to administrative tasks, and only 39% of their time on actually moving a sale forward.

Digital and, especially, ready-to-use mobile tools, are capable of dramatically improving operational efficiency and enhance productivity for in-house advisors, sales agents or third-party agent networks alike.

In a research conducted by BSharp Sales Enablers, 96% of field sales professionals said they preferred a mobile solution to a PC-based solution for work.

For financial service providers, failing to meet the challenges might also mean non-compliance to legal regulation. Besides the well-known MiFID 2 and GDPR regulations, European insurers, will also have to comply with the Insurance Distribution Directive (IDD) from February 2018 - according to a recent survey, 53% of insurance professionals consider this their biggest challenge.

At SCOLVO, we are focusing on fulfilling all the requirements our partners have to accommodate on a daily basis, like MiFID 2, GDPR, and also the new IDD regulations.



SCOLVO SALES

The SCOLVO Sales mobile business application is designed to improve the sales performance by providing integrated client information, training, and coaching services on mobile devices for field sales representatives and frontline sales managers.

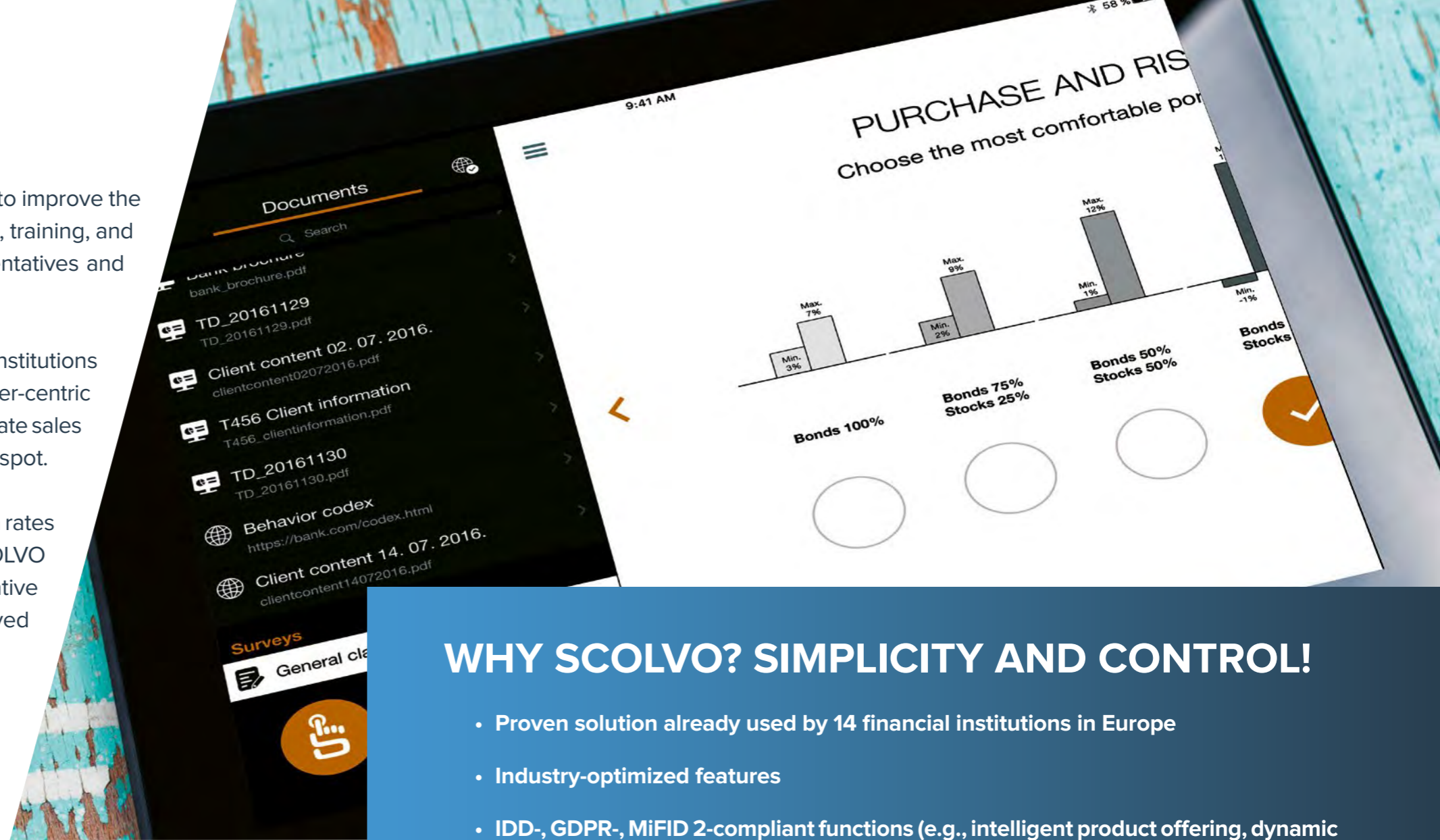
More than **5,000** sales professionals in **14** different financial institutions worldwide log in our applications every day to leverage customer-centric sales processes, create engaging and personalized offers, update sales pipeline information and efficiently finalize a contract on the spot.

By using the SCOLVO SALES application, the sales conversion rates may increase by up to **26%** (based on actual data from SCOLVO clients). The results are due to better data quality, participative selling (involving customers in the sales process) and improved supervision of daily work.

BENEFITS

The ready-to-use **SCOLVO SALES** application successfully supports the managed, personalized, and controlled sales operations in financial services, with the following features:

- It helps banking product advisors and insurance sales representatives prepare for **face-to-face interactions** with prospects: scheduling client meetings, reviewing customer data, making personalized offers, and get real-time feedback about their performance.
- By using mobile devices, **agents are able to engage with their audiences** from anywhere: they always have the latest product information, questionnaires for demand assessment, interactive presentations, personalized offers powered by AI.
- The deals are closed faster due to automated sales workflows, real-time quoting, and **on-site contracting, using the digital signature feature.**
- It helps sales management by reducing the administrative burden on sales reps and by opening **the “black box” of a personal sales meeting through reports.**
- SCOLVO solutions are MiFID 2-, GDPR- and IDD-compliant.



WHY SCOLVO? SIMPLICITY AND CONTROL!

- Proven solution already used by 14 financial institutions in Europe
- Industry-optimized features
- IDD-, GDPR-, MiFID 2-compliant functions (e.g., intelligent product offering, dynamic questionnaires, activity logging, flexible workflow support)
- The whole sales process is covered, from client classification through presentation, calculation, quotes, and contracting
- Easy-to-use: simpler than a CRM
- Enhanced mobile user experience for higher user acceptance
- Compatible with existing IT-architecture - robust back-end easily connects to legacy and standalone systems, plus offers a large number of ready-to-use interfaces
- Future-proof continuous updates
- Compatible with major mobile operating systems
- Online and offline mode, autosave, and intelligent data synchronization
- Easy customization and deployment with ready-to-use SCOLVO building blocks

ABOUT SCOLVO

Delightful business mobile apps for sales and fieldwork processes

SCOLVO is a key player in the enterprise mobility market with an extensive experience in fast and efficient workforce mobilization. We take particular pride to provide beautiful mobile applications suited to the needs of **sales representatives**. Our solutions make **sales processes** more productive: your employees will work more efficiently, and they will also be more engaged when using SCOLVO's customized mobile apps.

Discover how you can use our expertise by downloading our **FREE DEMO** application:



Our apps have been successfully deployed at key players in the financial industry:

- At Aegon Insurance, SCOLVO Sales allowed the agents to have 360-degrees, on-the-go access to data, guided workflow solutions, and on-the-move dialogue panels. With this mobilization, Aegon achieved the benefits of smooth collaboration and data flow, shortened the deal-closing time, and a higher hit-and-win ratio, among others.
- At Merkantil Bank, about 50 field sales agents visiting car dealer clients are now able to have up-to-date information at their fingertips about the offerings. SCOLVO Sales allows the team to have paperless (quicker and more efficient) processes. Reporting has also become faster and more up-to-date with automatic real-time updates instead of manually updated daily report tables.
- At our retail banking partner, task management of private banking advisors has dramatically improved, due to the SCOLVO Sales features of dynamic scheduling, pre-set workflows, and personal to-do lists. The app also generates an automated report about client meetings, further improving the distribution of information within the team. Due to participative sales allowed by the presentation and questionnaire features of the app, the bank has seen its performance figures to improve as well.

We have also been working with market leaders in various other industries, such as Roche, Novartis, Rewe Group (Penny Market, Billa), Rossmann or Glencore.





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