Introducing

Our Adviser Experience Programme

For Financial Professional Use only

AKG A
FINANCIAL STRENGTH RATED
PLATFORM SECTOR SUPERIOR
STANDARD LIFE SAVINGS LIMITED

abrdn.com

Delivering the experience that matters
to your business and clients

Actively investing in our platforms

Continued and accelerated investment in our platforms

We aim to be your
first choice
platform with our commitment to delivering market-leading functionality, now and in the future

We'll deliver what
matters most
to your clients and your business by listening and fully understanding your needs

Team of dedicated
experts
working to accelerate our platform capability, ensuring it's right first time

Delivering operational excellence

Our capabilities

Supporting **419.5k** clients across **2,700** adviser firms

Dealing error rates remains below **0.5%**

33,000 calls on average answered every month

Over **1.6m** trades processed each month with **99.9%** straight-through processing

1 million service requests completed each year

Highly **experienced** colleagues across our dedicated servicing teams

defaqto 2021 GOLD Platform Service

defaqto EXPERT RATED Adviser Platform 2021

Schroders UK PLATFORM AWARDS 2020 The NextWealth Award for Best Platform Service WINNER

Information correct as at December 2020

Delivering a platform that makes it easier to serve your clients

Accelerating our Adviser Experience Programme

Optimising your digital experience

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We know your time is under pressure. From effortless onboarding of clients through to a simple and intuitive interface – our improved digital experience will help you complete key tasks quicker.

Improved client reporting and business intelligence

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We want to do more for you so you can spend more time with your clients. Our new customer-centric model will ensure you have all latest information you need at your fingertips, helping you run your business efficiently.

Delivering a full advice suite

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We're building a comprehensive solution that meets the needs of your client base. By extending our product suite and investment capabilities, you can fully optimise your clients' tax allowances and support broader family wealth planning needs.

Providing platform service excellence

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Want quick self-service when you're ready and customer service when you aren't? We're heavily investing in our service infrastructure. You can expect a more connected and better informed experience when you contact us and streamlined, intuitive processes when you don't. .

Functionality and support that will make a real difference

Optimising your digital experience

- E-signatures fully enabled
- Fast and secure email
- New and intuitive platform user interface
- FundZone fully online

Delivering a full advice suite

- Flexible ISA
- Multiple Personal Portfolios
- Third party Personal Portfolio
- Fully online SIPP, including drawdown
- Improved online Offshore and Onshore Bond capability
- Junior ISA
- Junior SIPP
- New stockbroking solution providing cost-effective investment

Building a solution around your business and your clients

Improved client reporting and BI

- Up-to-date and accurate bulk valuations
- Improved and automated adviser charging feeds
- Customer-centric model providing one consolidated client record with no re-keying
- New client reporting capabilities – keeping client experience front of mind

Providing platform service excellence

- New Amazon Web Services telephony - leading retail experience
- Introduction of Salesforce Service Cloud
- Flexible contact options, including live chat
- Platform-based agency management – one view across all client propositions
- Improved workflow case tracking with faster processing and timely alerts

The products and service referenced above are currently in development. We'll provide timely updates on when you can expect to access them on the platform.

Adviser Experience Programme

Roadmap to excellence

Scheduled to launch in 2021

- E-signatures fully enabled
- Fast and secure email
- New and intuitive platform user interface
- FundZone fully online
- Up-to-date and accurate bulk valuations
- Customer-centric model - single client record
- New client reporting capabilities
- Flexible ISA
- Multiple Personal Portfolios
- Fully online SIPP, including drawdown
- New Amazon Web Service telephony - leading retail experience
- Introduction of Salesforce Service Cloud
- Platform-based agency management
- Improved workflow case tracking

Scheduled to launch in 2022

- Improved and automated adviser charging feeds
- Third party Personal Portfolio
- Improved online Offshore and Onshore Bond capability
- Junior ISA
- Junior SIPP
- New stockbroking solution providing cost-effective investment

Making it easier

What you need, when you need it, in a way that works for your business

Simplification

A new drawdown form with embedded data validation increases ‘right first time’ completion.

Digital signatures accepted from more providers.

Introduction of a dedicated progress update line means you can quickly check in on live requests.

More control

Helping you self-serve effectively with new guides in our online help centre and proactive engagement by phone and email.

Simplified journeys coming later this year as well as new fully online processes so you can do more on the platform quickly and easily.

Greater efficiency

A dedicated team are focused on reducing the end-to-end processing time for transfers.

A relentless focus on continuous improvement so we can deliver quicker and focus on what matters most to you.

Less waiting

We’re committed to answering your calls faster across all of our lines.

And our aim is to keep improving until we are meeting your expectations.

Continued investment

In the summer we’ll introduce Salesforce Service Cloud, world-class technology which will enable us to deliver a flexible and personalised service at scale.

We’re also making it easier to contact us by introducing new tools such as live chat.

Next steps

Adviser feedback and end-to-end testing

Online support hub with demos and user guidance

Comprehensive training programme

Advance notice and progress updates

All the support you need

Platform Consultant training sessions

Regular and timely updates

Ongoing support as required

All figures and awards are based on information as at 31 December 2020.

The value of investments can go down as well as up, and could be worth less than originally invested.

Delivering the experience that matters to your business and clients

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Thank You