

# CASE STUDY

## ORIGO'S TRANSFER TRACKING IN ACTION

***“60% of our administration team’s phone calls no longer have to be made. Origo’s Transfer Tracking has been invaluable in helping us manage the influx of applications. Who knew a service could transform your customer’s experience from good to great in just a few clicks?”***

*Mark Ormston, Retirement Line*

### KEY STATS & BENEFITS:

- 60% reduction in the number of phone calls.
- Streamlined and improved customer experience with real-time tracking.
- Legal & General implemented Transfer Tracking in a simple six-step process.
- Essential to providing advisers and their customers with up-to-the-minute information on their transfer.

### PLATFORM VIEW: LEGAL & GENERAL

#### Introducing Track My Apps



Real-time updates are essential to removing hours of phone calls and time spent providing updates to advisers and their customers on cases. So, for Legal & General, adopting Transfer Tracking from Origo was a no-brainer. Set-up in just six simple steps, Legal & General were able to integrate Transfer Tracking in to their digital suite to enable advisers’ access to real-time information on their applications, saving all parties significant time and money. Crucially, Transfer Tracking has enhanced Legal & General’s customer-centric proposition, helping to keep the adviser and their client informed of progress.

### CUSTOMER VIEW: RETIREMENT LINE

While Retirement Line do receive good response times from platforms to their phone calls for updates, nothing is as good, quick or reliable as real-time, digital responses. Retirement Line are constantly seeking updates for cases but by using Transfer Tracking via Legal & General’s ‘Track My Apps’ digital service they found the time saved has been invaluable. Thanks to Transfer Tracking they have reduced phone calls by 60% meaning Retirement Line are now able to spend more time supporting their customers and less time chasing for updates.

***“Currently, when our team calls a provider the call usually goes to a helpdesk, not an individual dealing with the case. Thanks to Transfer Tracking we’ve already reduced the phone calls we make by 60%, if ALL platforms committed to using this service we would save 90% of the time we spend making phone calls – imagine what that would mean for our industry, and importantly, the customer.”***

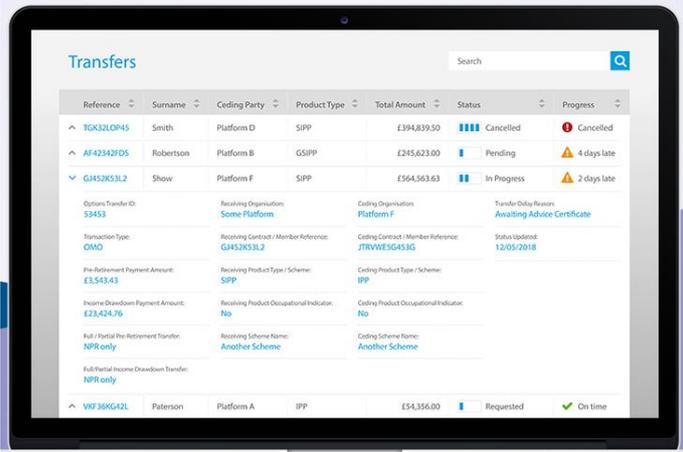
*Mark Ormston, Retirement Line*

## WIN, WIN, WIN

Platforms	Advisers	Customers
✓ Reduction in customer support queries relating to transfers and new business	✓ Reduced phone calls and costs chasing for updates on transfer progress	✓ Improved journey with less waiting for updates
✓ Quick integration	✓ More time spent on value-add activities	✓ Known timescales
✓ Tried and trusted service with reliable data	✓ Seamless, quick access online	

## HOW DOES TRANSFER TRACKING WORK?

Origo's Transfer Service supplies the data to Origo's Integration Hub and the extracted tracking data is integrated to the platform via a simple API. A sample screen showing how it looks with expanded information is provided below.



Reference	Surname	Ceding Party	Product Type	Total Amount	Status	Progress
TGK32L0P45	Smith	Platform D	SIPP	£394,839.50	Cancelled	Cancelled
AF42342F05	Robertson	Platform B	GSIPP	£245,623.00	Pending	4 days late
G4452K53L2	Show	Platform F	SIPP	£564,563.63	In Progress	2 days late

Options Transfer ID: 53453	Receiving Organisation: Some Platform	Ceding Organisation: Platform F	Transfer Delay Reason: Awaiting Adviser Certificate
Transaction Type: OMD	Receiving Contract / Member Reference: G4452K53L2	Ceding Contract / Member Reference: JTRWESG453G	Status Update: 12/05/2018
Prior Retirement Payment Amount: £3,543.43	Receiving Product Type / Scheme: SIPP	Ceding Product Type / Scheme: IPP	
Income Drawdown Payment Amount: £23,424.76	Receiving Product Occupational Indicator: No	Ceding Product Occupational Indicator: No	
Full / Partial Pre-Retirement Transfer: NPR only	Receiving Scheme Name: Another Scheme	Ceding Scheme Name: Another Scheme	
Full / Partial Income Drawdown Transfer: NPR only			

## GET SET UP IN SIX SIMPLE STEPS

As an Origo Transfer Service customer, you just need to follow these simple steps:

1. **Contact** - Complete an agreement or contract with us.
2. **Set-up** - We set you up in our User Acceptance Testing environment.
3. **Configuration** – Enter your preferred settings. This includes setting up the frequency of the data.
4. **Build** - Build the user experience and journey for Transfer Tracking screen into your portal.
5. **Testing** - Test the service to make sure it's good to go.
6. **Go-live** - Once testing is complete, all settings are applied in 'Live' by Origo.

Call Vicki Cranston today to get started 0131 451 5181.