

Protection Platform adviser testimonial



Alan
Knowles

Managing Director

Cura is a multi-award-winning protection intermediary firm of 7 advisers based in North Yorkshire. We specialise in helping clients who struggle to obtain protection insurance, many of whom have been turned away or declined on grounds such as medical disclosures, travel or occupation.

Main benefits of using the Protection Platform

- Saves our business time and money
- Gets our clients the cover they need as quickly as possible
- Ensures minimal re-work for declined cases

1

Can you explain your protection sales process before using the Protection Platform? What were your issues and challenges?

Before using the Protection Platform, the process was very time-consuming and when we were given incorrect information at pre-sales stage, it could result in inaccurate quotes and significant rework. Before using the Protection Platform we would:

- Complete a client fact find
- Price up product options using a standard comparison service
- Call various underwriting help lines to establish the best provider for the client's particular circumstances and medical history
- Loop round again if initial information provided was inaccurate

2

What did the Protection Platform deliver, what are the key benefits and how has it improved your processes?

Using the Protection Platform has provided a simple way for our advisers to instantly compare prices and outcomes from a number of insurance companies. This has saved a huge amount of time for many 'standard' clients as well as those with health conditions such as diabetes, high blood pressure and BMI in particular.

“*There is a clear drive for the protection industry to provide more accurate pricing based on a client's medical history, as well as quicker decisions. The Protection Platform's ability to provide an instant underwritten price without the need to call underwriting help desks or be spun off into different insurer extranets is invaluable to our business.*”

ALAN KNOWLES - MANAGING DIRECTOR

We see four key benefits to our business, namely:



Saving our advisers time



Allowing a quicker quote to be provided to our clients



Enabling us to give more accurate quotes



Saving reworked applications should an insurer decline a client



If one provider declines a policy for some reason, we don't need to go back through the application process again. The Protection Platform allows us to re-use the same information to search other providers, saving us significant adviser time and making it quicker to get the client the cover they need. I'll certainly continue to recommend the Protection Platform to other protection advisers.”

ALAN KNOWLES - MANAGING DIRECTOR



Sign up now or find out more at www.underwrite.me.co.uk

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