



**Inttiger**





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# Strategic Plan

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*“To Liberate Our Partners through Intelligent Technology  
& Outstanding People”*

## **BUSINESS UPDATE**

April 2019

Recap

# Our Strategy

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## SMART TECH & REGTECH SOLUTIONS

- Develop & deliver leading advice software solutions for quality & efficiency at scale
- Deliver AI-driven innovative SaaS solutions
- Develop & deliver an AI-driven RegTech solution (Dynamic Compliance System)

## MARKET INTEGRITY

- Build market integrity through partnering institutional clients & self-employed practices
- Refresh the branding and corporate digital image

## HIGH QUALITY SERVICE

- Build a competent team of staff (advice & practice management) that consistently meet the required standard
- Build scalability to deliver the required volume
- Inhouse technical capability (SMEs that train our own staff & foster organic growth)

# Partnership Options with Intiger

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## BOOM TECH-ONLY SOLUTIONS (SAAS)

- Client Discovery Solution (Online Fact Find)
- Automated Advice Processes
- Dynamic Compliance Solution
- Data Analytics & AI Application

## HYBRID BOOM TECH + OUTSOURCE SOLUTION

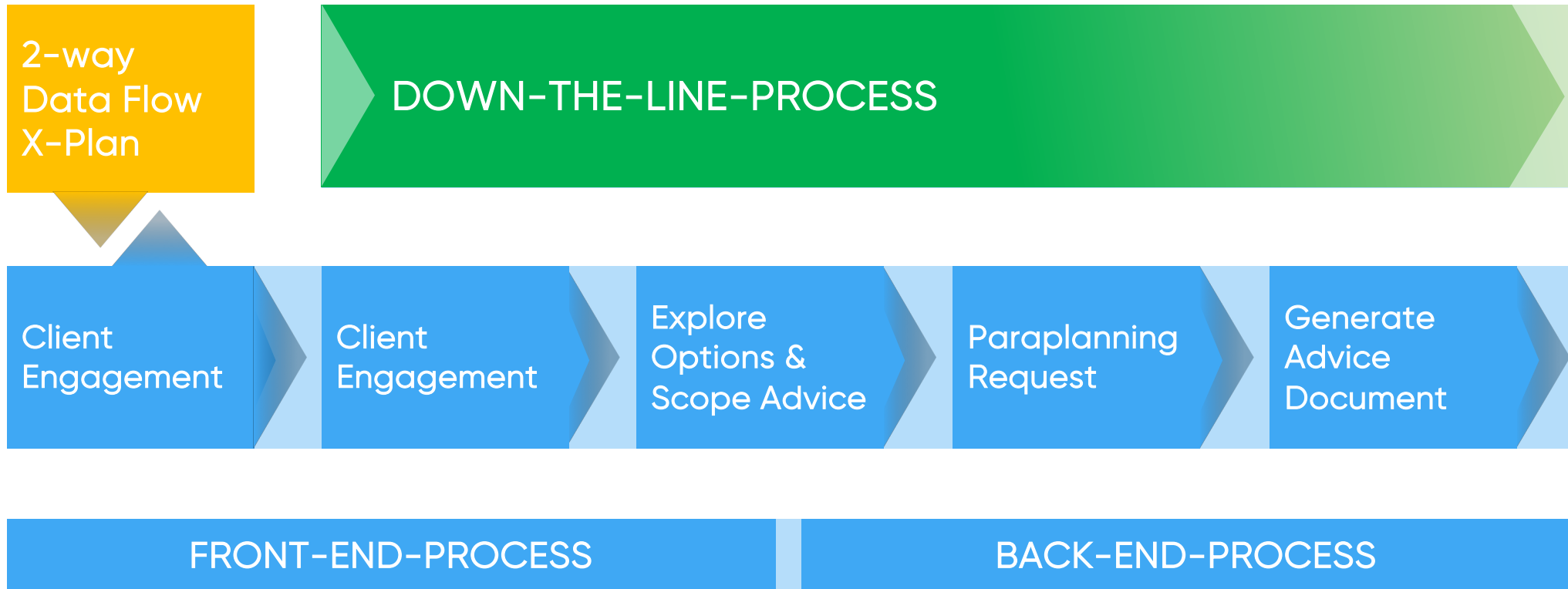
- Use BOOM ordering platform
- Use BOOM tools such as ClIFF and Advice Request
- Inject human resources where capacity / expertise is required
- Digital capture facilitates Data Analytics (e.g. QC learnings)

## OUTSOURCE SOLUTION

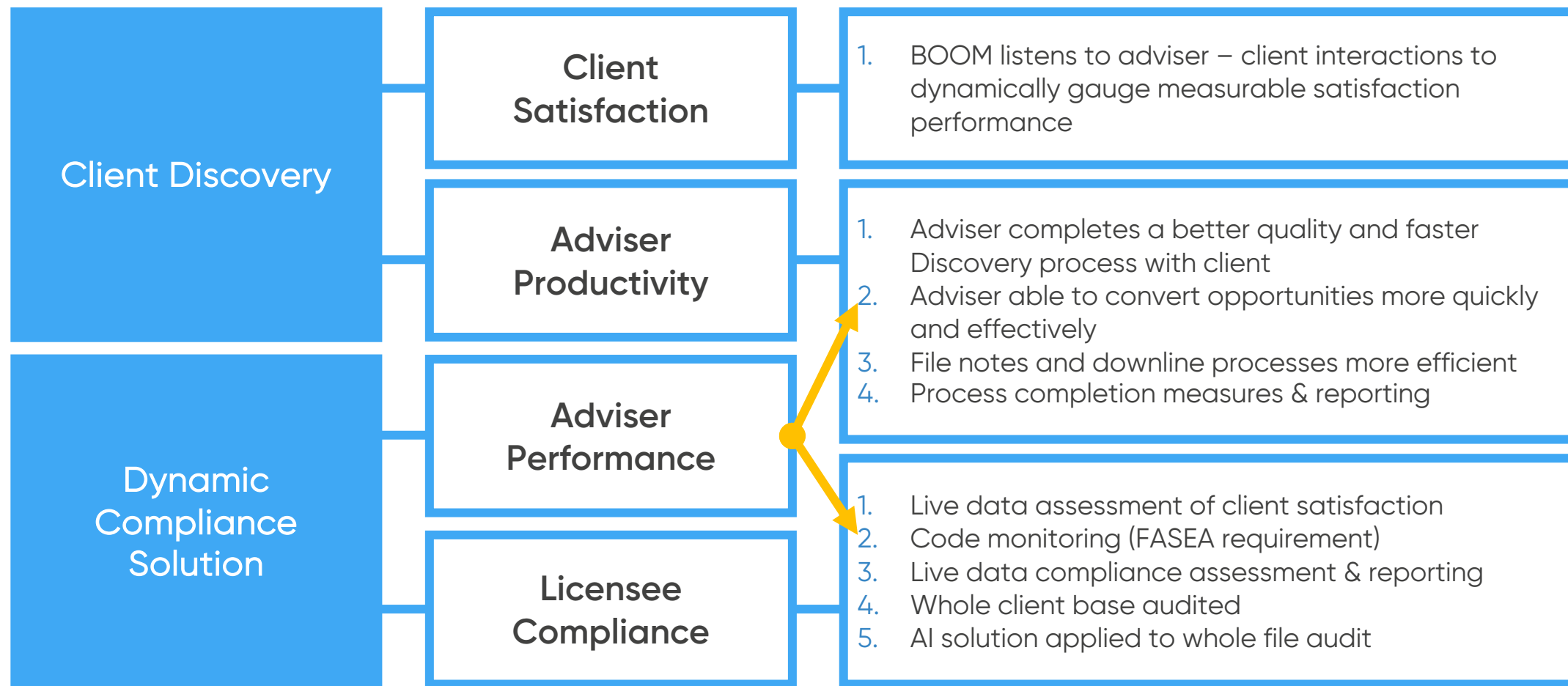
- All work ordered through BOOM
- Work done in Client CRM using their system
- Dedicated Client Service Officer (CSO) solution
- Quality-checked outputs
- Practice Management process improvement

# BOOM Front-end Connectivity & Natural Language Processing

## Smart Tech & RegTech Solutions



# 2019 Tech Roadmap





Innovative & Adaptive Financial Planning back office processing platform

## SMART TECH & REGTECH SOLUTIONS

### Quarter 1

- ✓ Natural Language Processing Enhancement to Fact Find
- ✓ Digital Marketing Campaign

### Quarter 2

- Dynamic Compliance Solution (AI application RegTech)
- Broaden BOOM2 Whole Process Solution



### BOOM Features

- Digitisation
- Process optimisation
- Automation
- Artificial Intelligence application
- Offshore processing
- Single touch data entry
- Data analytics for improvement



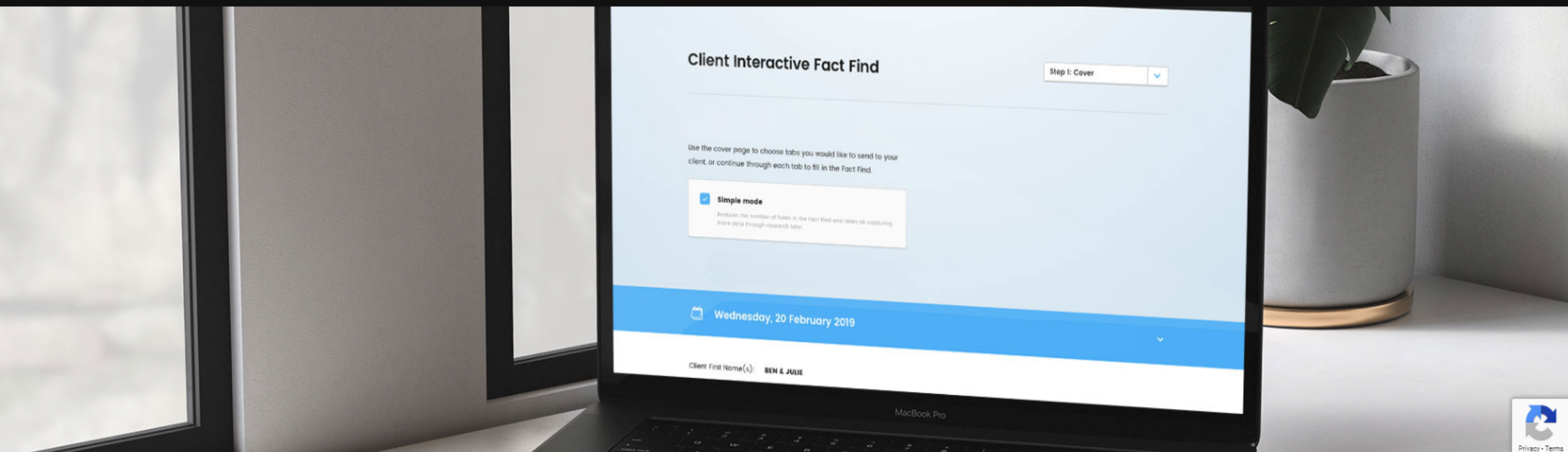
### BOOM Outcomes

- Significantly lower cost of production
- Significantly increase productivity



### BOOM Drives

- **Licenses** – Network control, compliance, oversight, productivity, scale
- **Practices** – Reduced back office costs, scale, productivity and profitability



# Progress to 2019 Tech Roadmap Deliverables

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## 1. Natural Language Processing

- Incorporating Voice Commands in addition to Voice to Text (12 commands, 537 voice-reactive field references)
- Scoping of project has commenced for AI support to Natural Language Processing
- Exploring down the line process potential

# Progress to 2019 Tech Roadmap Deliverables

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## 2. Digital Marketing Campaign

- 15 workstreams (9 actioned, 6 in progress)
- Website and BOOM Interface refresh on track for launch
- New collateral in use (CSO flyers, Powerpoint, email signatures)
- Media and communications strategy refresh
- Video promotion – better, slicker marketing

# BOOM Enhancements – Client Discovery

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- Adapted back-end to allow syncing data with 3<sup>rd</sup> party CRMs
- Streamlined and connected assets/liabilities with income/expense
- Obtained XPlan APIs and implemented data transfer capability from Client Discovery to Xplan and Vice Versa
- Simple and complex mode to change to varying client needs / comfort
- Drag and drop file capability
- Bootstrap 4 to enable easier enhancement and adaptation to different devices (laptop, smartphone, tablet)
- Maximum auto-population to deliver to 1 data entry principle
- Adapted to accommodate new licensee Advice requirements
- Built and tested full PDF export functionality
- Expanded Voice to Text to cover majority of fields, with addition of Voice Commands

# BOOM Enhancements – Quality Control

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## QUALITY CHECKING (QC) Foundation for Dynamic Compliance System

- Built QC checklist to apply to all completed SOAs produced
- Updated staff workflows to incorporate quality control checks
- Addition of instant order functionality to accommodate CSO/ad-hoc client base
- Creation of integrated reports on staff workload and revenue generation

# High Quality Service

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- Intensive Training Program in Cebu & Manila to quickly grow scale in progress
- An in-house quality and efficiency control system will provide real time data on performance

## TIMELINES & PROGRESS

25 trainees signed recruited for CSO and Paraplanning program

- Ontrack

### Core CSO Program

Delivered in Cebu  
(JANUARY - MARCH 2019)

- On Track. Trainees are now performing tasks e.g. research calls, annual planning meeting reports, FDS statements.

### Core Paraplanning Program

Delivered in Manila  
(JANUARY - APRIL 2019)

- Paraplanners recruited and nearing conclusion of initial training program.

# Market Integrity

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We will become the trusted partner to the major target players in Australian Wealth Management

## SPECIFIC ENGAGEMENTS

- Build quality and scale with our major client network
- Engage additional 1<sup>st</sup> and 2<sup>nd</sup> tier Institutions (Hybrid and / or SaaS offer)
- Pursue 1<sup>st</sup> and 2<sup>nd</sup> tier Institutions with Advice Arms
- Penetrate major Licensees with Hybrid and/or SaaS offer

# Prospect Engagement

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- 1 The Intiger team have commenced a targeted digital marketing campaign coinciding with the brand refresh.
- 2 Intiger management have engaged major licensee networks creating adviser and practice demand as well as “top-down” corporate team engagement.

A low-angle, upward-looking photograph of a modern skyscraper with a glass facade. The building's structure is composed of a grid of dark metal frames holding large, reflective glass panels. The perspective creates a strong sense of height and verticality, with the lines of the building converging towards the top right corner. The sky is a clear, pale blue, providing a clean background for the building and the overlaid logo.

 **Intiger**