

How do I start client focused research?

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Research can either be 'Client focused' or 'Product focused'. This article will explain how to start a piece of 'Client focused' research.

Please refer to 'How do I start product focused research?' for more information on product focused research.

You would use 'Client focused' research when you are researching into a specific recommendation for a client. You can record the client's details and any benefits/contributions that are relevant to the policy, therefore you will only be shown contracts that are relevant to the client.

Select the product type you wish to research from the **Homepage**. In this example **Personal Pension (Fully Insured)** is being selected:



The screenshot shows a navigation menu at the top with the following items: Home, Pension savings (highlighted), Pension income, Life, Health, Investment, Finance, Offshore, and [Recent]. Below the menu is a table of pension products with the following data:

Product Type	Contracts	Providers
Executive Pension		
Executive Pension	2 contracts	2 providers
Group Personal Pension (Including Stakeholder)		
Group Personal Pension (Including Stakeholder)	17 contracts	8 providers
Personal Pension (Fully Insured)		
Personal Pension (Fully Insured)	36 contracts	21 providers
Section 32		
Section 32	8 contracts	7 providers
Self Invested Personal Pension		
Full	101 contracts	66 providers
Hybrid	24 contracts	14 providers
Small Self Administered Scheme		
Deferred	2 contracts	1 provider
Full	30 contracts	30 providers
Hybrid	2 contracts	1 provider
Stakeholder		
Stakeholder	8 contracts	7 providers
Trustee Investment Plan		
Trustee Investment Plan	19 contracts	15 providers

You will be navigated through to the client details screen:

Enter client data

Client entry

Client 1

First name:

Last name:

Date of birth: (dd/mm/yyyy)

Sex:

Smoker: Yes No

Occupation:

Annual earnings:

Benefits/contributions

Retirement Age: years

Term: years

(Leave fields below blank if other premium frequency required):

Monthly contribution (gross): £

Single contribution (gross): £

IMPORTANT - Please select Features to match premium frequency required:

The client information you need to enter consists of the first name, last name, date of birth, gender, smoker status, occupation and earnings. These are all mandatory fields, indicated by the field name being highlighted in red.

If the type of product you have selected can be written on a joint-life basis then you will be given the option of entering two clients.

As well as the client details you can also enter **Benefits/Contributions** for the contract. This information will vary depending on the product type selected. By completing this area, the system will remove any contracts that do not support the client's requirements.

If you have previously entered the client on Synaptic, they can be selected from the **Load** button. Selecting the load button will display a pop up screen to search for previously entered clients:

Enter client data

Client entry

Client 1

First name:

Last name:

Date of birth: (dd/mm/yyyy)

Sex:

Smoker: Yes No

Occupation:

Annual earnings:

Benefits/contributions

Retirement Age: years


Term: years

(Leave fields below blank if other premium frequency required):

Monthly contribution (gross): £

Single contribution (gross): £

IMPORTANT - Please select Features to match premium frequency required:



Select the client and the client details will be pre-populated. Enter the **Benefits/Contributions** as required.

Select **Start research** to start researching the contracts available.