

AT8 InfoBlog – Distribution Technology Limited

Company Overview

Distribution Technology (DT) has been providing online sales tools to the market for a number of years, initially using their stochastic modelling tool - Dynamic Planner. More recently, they have extended this to include a full point of sale and CRM system called DPoS. The visual appeal and usability of DPoS is high, as is the creditability of their stochastic and sales tools' background. Their POS solution is still young but has had considerable new business wins including the likes of Openwork, CIS and LloydsTSB.

Distribution Technology remains privately owned by the directors and management team. The company is led by Ben Goss and Patrick Fitzgerald but with other NEDs such as Ges Whitmore, Neil Brown and Adrian Hall who also having shareholdings (along with a number of other smaller shareholders).

Product Overview

Distribution Technology markets their product range as Financial Planning & Sales Applications solutions with a number of core modules, namely:

Planning and Sales Platform
Dynamic Planner
Retirement Planner

Financial Ecosystem
Dynamic Risk Profiler
Financial Health Check

Dynamic Point of Sale (DPoS)
Investment Planner

The most established products are Dynamic Planner and Dynamic Risk Profiler but it is DPoS, their point of sale solution that has the big price ticket and is getting a great deal of market attention at the moment. DPoS covers: CRM functions, factfind, risk profiling and asset allocation, planning and needs analysis, product and fund research, quotes and illustrations, suitability reports, transaction creation, arrangements and valuations, planning reviews and alerts.

Solution Strengths

Strong Financial Planning tools
Good user interface
Single 'financial ecosystem' throughout all systems
Good technical architecture with support for on and offline working

Key Clients

Major client for DPOS is:
Openwork
Major clients for Dynamic Planner include:

- Friends Provident
- LV=
- Prudential
- AEGON
- Scottish Widows
- Cofunds
- BNP Paribas

Solution 'Sweet Spots'

Providing tools for Insurance provider Extranets
Point of sale tools for wealth managers and financial planners
Support for large distributors who need customisation to accommodate differentiated sales processes

Important Notes

The AT8 InfoBlogs are designed to give a brief précis of the key technology suppliers to the distributors of financial services. They are designed for users to gain a quick background on companies and their solutions prior to starting on a formal IT review or supplier procurement. They contain information that is publicly available combined with an expression of opinion formed from AT8's experience of dealing with the leading companies in the market. We make every effort to ensure the information is accurate at time of publishing the InfoBlog, but due to the dynamic nature of the information, it should be confirmed prior to any formal decision being made.

The InfoBlogs are a basic start point that can help in gaining context when considering your e-commerce needs.. It is likely that further opinion or information about each supplier will be needed prior to short listing or selection and AT8 will be happy to help address individual needs with its wealth of additional information and experience. AT8 also has a clear and fast methodology for procurements that has been proven to save time and money as well as improve the outcome of the decision.

If you would like to discuss this InfoBlog further or would find value in an InfoBlog on a supplier not currently published then please contact us at marketing@at8-group.com or telephone 0121 314 2504.

About AT8 Group

AT8 Group Ltd is an innovative consultancy company with knowledge, skill and experience across a broad range of Financial Services and IT related disciplines.

Our experience of working with providers, intermediaries, lenders and IT companies puts us in a strong position of understanding needs and opportunities. Our skills allow us to use our knowledge along with our ability to innovate and proactively to create and implement differentiated business improvement propositions that add tangible value to our financial services' clients and partners. In addition we supplement our own knowledge with current market data from research agencies such as Datamonitor with whom we have a strong relationship and access to their Financial Services Knowledge Centre.

Specific areas of expertise for AT8 include

- E-Commerce Strategies
- Point of sale and Back-Office solutions, including portals
- Procurement and negotiation
- Sales and Marketing strategies
- Financial services Regulation including MiFID
- International market analysis

AT8 can support and add value to the full lifecycle of a project from the initial idea generation to operating the project and eventually reviewing and renewing the project.



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