

AT8 InfoBlog – True Potential

Company Overview

True Potential is a relatively new technology company born out of the Network called 'Positive Solutions'. It's business model is very different from the traditional technology suppliers as there is no upfront charge, instead, they take a 'skim' (%) off the customers (users) revenue. The first large client for True Potential was Positive Solutions and the systems they have installed there are impressive. They operate predominately online, but with the ability to work offline as well. They have more recently announced a 'distribution agreement' with Tenet Group (another large Network).

True Potential was set up by the Chairman David Harrison, who also founded Positive Solutions. The venture is owned privately by the 28 members of staff. However, users are also offered stakes according to the level of business they put on the platform.

Product Overview

The True Potential system has a broad range of functionality covering:

- Sales processes such fact finding
- An electronic advice and business submission process via their own portal
- Electronic pipeline
- Electronic payment of commissions & fees
- Electronic file storage
- Online presence for clients and their introducers
- Client Relationship Management system
- Full Treating Customers Fairly module
- T & C support
- TCF and
- An Administration capability

Recent investment has been made in introducing compliance tools and services to enhance their offering further.

Solution Strengths

Wide Breadth of solution coverage

Strong TCF module

User friendly approach to pipeline tracking

Differentiated pricing model

Key Clients

Clients Include:

- Positive Solutions
- Tenet
- Great British Finance
- Broadlands Partnership
- Moffatts
- GMWIFA
- Excel 121

Solution 'Sweet Spots'

Small IFAs wanting a technology platform, with no upfront capital outlay.

IFAs wanting to combine technology and compliance services from a single supplier

Any distributor considering a new technology platform across their whole enterprise, including front, middle and back office

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 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
- 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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