

AT8 InfoBlog – Weblines

Company Overview

Weblines, now part of the Capita Group, is one of the three major IFA portals and has been in operation since 1995. They are heavily committed to the use of Origo [Industry] Standards and claim to generate the largest volume of online quotations using the Origo Messaging Standards.

They have 17,500 Financial Intermediary firms, with 30,000 users registered. They provide these users with services across 22 Life and Pensions Providers, 18 General Insurance providers and 6 traded Endowment service companies. Some 2,000 IFA firms also integrate Weblines's quotation engine into their own adviser website. Weblines provide more than 3 million individual quotes every month.

They are quite agile and well respected in the industry with particular strength in the protection market.

Service Overview

Weblines's Services include:

- B2B Quotation Service
- B2B2C Quotation Service (i.e. direct to consumer via the intermediaries website)
- Annuity Service
- Multi- Policy Analysis Tool
- Online Electronic Submission of new business via Origo PACs
- Online Electronic Submission of new business via Extranet Linking
- Paper based applications with a library of PDF application forms
- Weblines's Sub-agent system to support network models cascading commission deals to its members
- Weblines's group system allowing networks to add and delete firms
- Business Tracking

The service provides access to a wide range of products including: Protection (Term Assurance, Convertible Term, Mortgage Protection, Family Income Benefit, Whole Of Life), Income Protection, General Insurance (Accident, Sickness and Unemployment, Household), Investments (With-Profit Bonds, Investment Bonds, Distribution Bonds), Pensions (Employed, Self Employed, Executive), Annuities and Compulsory Purchase Annuities, Traded Endowment Policies.

Weblines costs £10 per month, per firm (with multiple users). There are no extra charges for specialist quote services and no extra charge to embed B2C quote forms into adviser websites. There is a one off fee of £500 to white-label Weblines screens. There is a separate charging structure for their web service interface.

Solution Strengths

Broad coverage of providers in the protection market

Strong ability to White label the solution to follow the brand of the distributor

Strong support of Origo Standards

Easy to do business with

Key Clients

Clients Include:

- Capita PortaVista
- Hitachi Capital

Solution 'Sweet Spots'

Mortgage led distributors

IFAs and Brokers needing a B2C presence

Networks

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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