



## Electronic Forms

Axon is working with TOWER to replace paper-based forms with wireless electronic forms, giving a competitive advantage to Advisers and better service for policy holders.

Tower Group has a range of wealth management products - such as funds management, superannuation and risk insurance products - that it offers to market via 3000 Investment Advisers and Brokers. These Advisers belong to independent financial services organisations, and generally visit clients at their home or office.

Wireless mobile electronic forms are providing TOWER Advisers with a real advantage in a highly competitive market. Transacting business remotely and wirelessly not only saves Advisers a lot of administrative time, it lets them respond instantly to customer requests for information.

**“Axon has been a fantastic partner to us in putting this together. It’s going to help drive our business, helping us improve service to our Advisers, and ultimately our policy holders.”**

Jeff Page  
TOWER  
Manager of Sales and  
Distribution

Axon has so far converted three key TOWER forms to electronic format, and partnered with Vodafone, Microsoft and HP to develop a bundled wireless offering. The bundle includes an HP Tablet, Microsoft InfoPath/Office 2003 and other accessories at favourable pricing.

A single set of customer data can populate multiple forms, removing the need to record the same information twice and avoiding re-keying errors. This is significant because most forms share common information, such as client name and contact details.

Converting manual forms into an electronic format makes it possible to interface information contained in the forms to other systems, which is an important strategic direction for TOWER.

**“Our long term view is that the application will progressively be developed and enhanced to incorporate more forms, and eventually to interface to other applications,” says Manager of Sales and Distribution for TOWER Jeff Page.**

“Ultimately, Advisers will send completed policy applications to our underwriters electronically, and notification that a policy has been issued will be sent back from the underwriter to the adviser in the same way. It’s consistent with TOWER’s drive to support best practices within the insurance and financial planning industry, and to encourage Advisers to record more information about interactions with their customers,” he says.

The launch of the new wireless offering sprang from extensive research conducted by TOWER among its Advisers, asking them what tools would best support them in their work. Jeff Page says the launch response from advisers has been overwhelmingly positive.

“A very large percentage have said ‘come and talk to us immediately’, and some have bought on the spot after the demonstration,” he says.

Axon’s TOWER project partners:

