

# Forester Life's POS solution

## FORESTER LIFE

Bromley, UK

### Online:

[www.forester.co.uk](http://www.forester.co.uk)

### Industry:

Finance

*"We chose CGI because of its skilled people and demonstrable knowledge of the financial services industry."*

Euan Allison, Managing  
Director, Forester Life

Forester Life is part of Foresters Marketing Group, a financial services and charitable organization that has been operating throughout the UK, USA and Canada for more than 125 years. In the UK, Foresters offers retirement, savings and investment plans, as well as life insurance and income protection to assist members with their financial security and peace of mind.

### The Challenge

As part of its move to a full UK corporate entity, Forester's management team committed to maintaining a direct sales force throughout the UK. This meant acquiring a new sales automation and Point-of-Sale (POS) system that would enable them to maintain cost-effective field operations, without having to incur the huge cost of opening branch offices across the country.

Foresters existing POS system was unreliable and had a number of compatibility issues with other Foresters applications. In addition, changes in legislation required Foresters to launch a number of new products. Further compounding the situation was the lack of Y2K compliance - leaving Forester Life only nine months to implement a new system. After considering several IT service providers known to be experienced in the UK financial services sector, Forester Life turned to CGI for help.

### How CGI Helped

CGI customized and enhanced its Financial Advisor Workbench (FAW) to meet Foresters need for a robust and reliable POS system, to be used by more than 100 Foresters advisers. The CGI team also added a number of compliance-based capabilities to meet regulatory requirements.

The development effort included a sophisticated workflow engine to manage the entire product purchase cycle, automatically routing information to sales managers for approvals or directly to Foresters or third party administration systems for processing.

### The Results

Since being switched on, the new POS system has been supporting Forester's business. Additional benefits include:

- Productivity and efficiency improvements
- Increased number of multiple product sales
- 261% growth in Forester's business

The bottom line: In spite of a difficult economy and highly competitive market, the new system is enabling Foresters to achieve all business targets, while maintaining its direct sales force.