

# iPipeline Illustration Suite ... Powered by COSS®

## Advanced Sales Module FAQs

### What is Advanced Sales?

Advanced Sales describes what is often referred to as the high-end market or alternatively as Advanced Markets. It concerns aspects of business life insurance, individual fringe benefit program, and family-oriented markets for life insurance. Within the Advanced Sales Module, there are 30 concepts evenly split between business and family orientation. As a Supplemental Illustration, Advanced Sales requires a 'feed' from an illustration program. The detailed life insurance policy information can then be shown in one or more of the modules to display the actual use of the policy within a marketing idea.

### How often are the concepts updated?

Updates to the printed content are scheduled on an annual basis and screen hints are available to be updated in each release. Clients are encouraged to submit appropriate publications or Web sites, as sources are expanding daily.

### Can the concepts be customized?

Absolutely! As part of the initial implementation of the software, your company's name and logo are automatically included. Other changes can be made on a time and material basis. Ideas for new concepts can be made during periodic user-group meetings or on a time and material basis.

### How easy to use are the concepts?

iPipeline prides itself on the ease of use and effectiveness of all its software offerings. There is not an extensive learning curve for any concept and the training component supplements the insurance company's training efforts. These concepts are not just number-crunching exercises but help the agent build a strong, visual story in advancing the sale to a profitable win-win situation.

### What is available within Advanced Sales?

Advanced Sales consists of 5 pieces:

**Overview** → This is a concept-specific prologue which educates the agent and prospect about what is involved in the concept and why it is important.

**Report** → This is the presentation of the solution, from both the employer and employee perspective. The columns are logically sequenced and include a page describing the calculation of each column.

**Presentation** → This is the support piece for the numeric-intensive report, which depicts the information using charts and graphs for quicker and easier understanding.



**Marketing** → This is a section of 'one-pagers' designed to assist the agent in educating the prospect. Issues like Transfer for Value and Incidents of Ownership are discussed.

**Training** → There are eight areas, covering ten concepts that have been targeted for additional training, each including interactive instruction and case studies.

**iPipeline™**

750 Springdale Drive, Exton, PA 19341  
800.758.0824 • Sales@ipipeline.com • www.ipipeline.com