How do I start client focused research?

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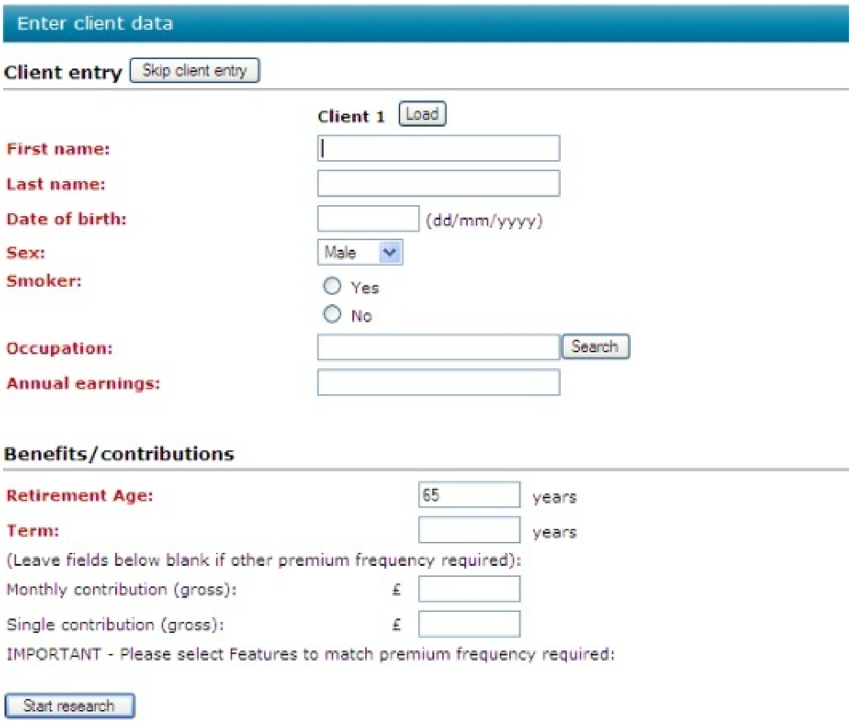
Research can either be 'Client focused' or 'Product focused'. This article will explain how to start a piece of 'Client focused' research.

Please refer to 'How do I start product focused research?' for more information on product focused research.

You would use 'Client focused' research when you are researching into a specific recommendation for a client. You can record the client's details and any benefits/contributions that are relevant to the policy, therefore you will only be shown contracts that are relevant to the client.

Select the product type you wish to research from the **Homepage.** In this example **Personal Pension (Fully Insured)** is being selected:

You will be navigated through to the client details screen:

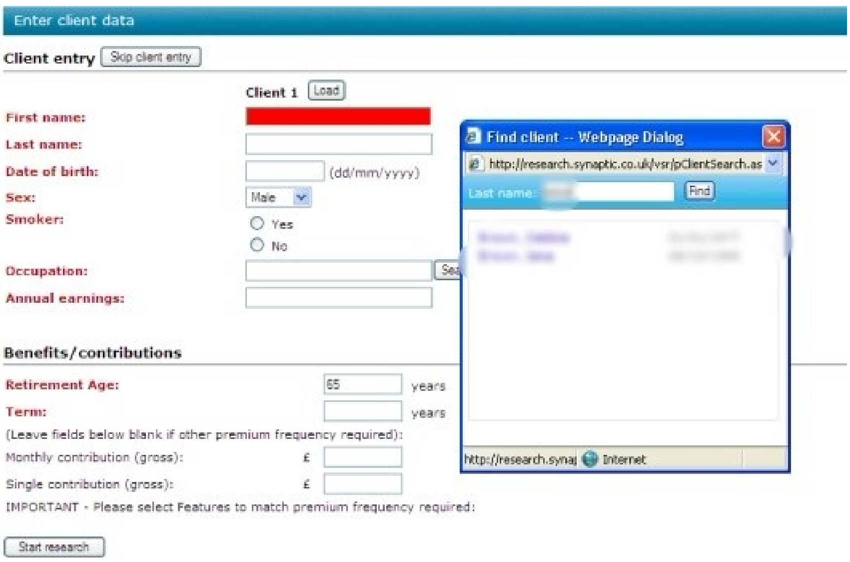


The client information you need to enter consists of the first name, last name, date of birth, gender, smoker status, occupation and earnings. These are all mandatory fields, indicated by the field name being highlighted in red.

If the type of product you have selected can be written on a joint-life basis then you will be given the option of entering two clients.

As well as the client details you can also enter **Benefits/Contributions** for the contract. This information will vary depending on the product type selected. By completing this area, the system will remove any contracts that do not support the client's requirements.

If you have previously entered the client on Synaptic, they can be selected from the **Load** button. Selecting the load button will display a pop up screen to search for previously entered clients:



Select the client and the client details will be pre-populated. Enter the **Benefits/Contributions** as required.

Select **Start research** to start researching the contracts available.