

Discover a smarter way to **acquire new business and build long-term client relationships**

SMARTBROKER

Acquiring new business and retaining clients are two of the most important aspects for any insurance broker. That's why we've developed nCino SmartBroker, which provides the information you need to succeed.

SmartBroker empowers brokers with rich, contextualised company information on every business in the UK and Ireland and increases sales distribution capacity. By leveraging data-driven insights, brokers can identify new opportunities and build strong, long-term relationships that drive growth and revenue.

SmartBroker enables insurance brokers

Prospect with precision: SmartBroker holds 6m data on over 6m companies in the UK alone; our powerful filters allow you to narrow those companies down to a workable prospecting list.

Harnessing insights derived from structured and unstructured data provides opportunities to engage, establish credibility, and create new leads with well-timed, relevant outreach that differentiates you from competitors and increases chances of securing that next meeting.

Data-driven insights to tailor outreach: Receive insights about fundamental changes about your prospects and clients, such as management changes, award wins, contract wins & expansion or changes to their risk profile, allowing you to provide relevant support and guidance when they need it most.

SmartBroker also gives you access to key industry influencers, providing you with market insights on changes in legislation, HSE activity and potential exposures that affect your client's business activities.

Benefits & Value

Prepare better underwriting submissions: Leveraging data-driven customer intelligence will ensure no knowledge gaps and that the submission process is aligned with customer needs and the requirements of tougher risk-averse underwriting conditions.

SmartBroker can help by providing access to key financial information; details of any previous adverse directorships (liquidations, bankruptcies etc.) and legal information, such as CCJs; combined with details of the corporate family tree, shareholdings, and people data, you can ensure you produce comprehensive, complete, and detailed submissions every time.

Increase client retention: Don't get blindsided by significant changes to your client's business and risk portfolio at renewal. SmartBroker flags potential issues and reasons to engage throughout the period of cover. Be alerted to changes in management; potential mergers and acquisitions; change of premises; relationship triggers, such as award wins; potential financial risks and opportunities.

Cultivate existing book of business: SmartBroker's daily insights into your client's world are the perfect way to trigger the conversation about additional product lines. Upselling and cross-selling mean that not only are policies per account more profitable, but it fosters a stronger sense of trust, establishing the broker as an advisor rather than simply a service provider.

SmartBroker features and data



Propensity Triggers

Our Propensity to buy Triggers identify potential exposures at companies, allowing you to have better, data-driven conversations.



Pre-qualification screening with pre-configured checks

Save time by quickly assessing any risk associated with potential clients, and improve the customer experience for clients by setting expectations early.



Family Tree & Group Explorer

Our family tree and visual representation of national and international linkages provide valuable information when compiling the employee's liability certificate, ensuring all subsidiaries are listed.



Financials

Our financial data can help you offer valuable expertise and guidance to your clients, fostering strong relationships and helping companies protect their economic well-being.



People

We provide information on all the relevant managers and directors of the business, allowing you to identify the right people to reach out to offer your services.



Companies House documents

A range of documents are available to download, including strategic reports. Strategic reports provide valuable information about challenges, risks and goals potential clients or customers face, allowing you to structure your outreach to meet their demands and needs.



Adverse Directorships

Adverse Directorship information can help you answer material fact questions about any directors who have a negative history.



CCJs & Legal Notices

Understanding legal notices and CCJs on clients can help you assess the risk associated with a client, which could affect premium calculations and policy exclusions and conditions.



HMRC Imports & Exports

nCino SmartBroker provides a detailed itinerary of all goods and locations, enabling you to discuss appropriate cargo insurance coverage.



Three words sum up why I love SmartBroker - innovation, engagement, and results. nCino makes our lives easier by fostering wider market engagement, delivering data straight to our fingertips and helping us drive positive change for our customers.

Ian Isaac, Premium Credit

