



Enable Top Tips

Our experts share some of their favourite tips to help you get more from Enable.



Customisable client facing valuation report tool

This allows you to use the system to add client's plans and values into a branded client valuation. By using the customisable option, you can produce and amend reports as required rather than manually creating one each time.



Bespoke, editable data sets

Classify your clients in a way that suits you by adding bespoke markers to a client. For example, use the data sets to add product features to a client, such as drawdown or guaranteed annuity rates, and then search by these data sets to focus your marketing activities.



Build bespoke process flows with task templates

This helps to ensure a consistent approach across the business. It gives you the ability to review and monitor the status of new business. For example, having a bespoke new business journey means that each new client will have the same, high-quality experience.



Integrated marketing and mail capabilities

Bulk send emails to your clients on any upcoming events, changes that they should be aware of or your latest newsletter. Creating a template with mail merge fields reduces the number of individual emails that need to be created.



Integrated factfinder and risk profiler

Creating a fact find online in Enable reduces the need to have a paper copy printed and sent to your clients. It's also fully integrated with Wealth Platform and includes the most up to date data based on the information the client has entered on their dashboard.