

Case Study

Mortgage Intelligence: Using Data to Improve Consumer Outcomes

Mortgage Intelligence has over 25 years' experience in providing support to mortgage and protection advisory firms in the UK. Their focus is providing the best customer outcomes, helping build the client's financial resilience and being there when it counts for their advisers.



The Challenges

Mortgage Intelligence needed to have access to user-friendly business intelligence reporting to simultaneously drive growth within the network and its member firms, while satisfying the needs of the FCA in relation to Consumer Duty.

They needed a cost-effective method to track adviser and application data to enhance their network offering and provide effective reporting and oversight.



The Solution

Mortgage Intelligence have been using iPipeline's SolutionBuilder since 2016, providing their advisers with market leading protection sourcing technology.

Enhancing this partnership with iPipeline by utilising InsureSight® meant Mortgage Intelligence could interrogate their user data to focus training needs, identify revenue opportunities and further promote best practice in protection sourcing, to the benefit of the network, their advisers and customers. InsureSight®'s reactive dashboard allows users within Mortgage Intelligence to quickly source and interpret relevant and up-to-date data to suit their needs.

The Result

As a result, Mortgage Intelligence has:

- Provided data-led bespoke training to firms and advisers based on their specific individual needs
- Developed and improved advice standards in the network
- Applied for a higher number of benefits per client than the market average
- Increased client to new business conversion rate by 5%
- Increased the financial resilience of clients by increasing Income Protection applications over 20%
- Deployed easy to interpret data that can be used to enhance their reporting capabilities, leading to improved board reporting

InsureSight® has provided Mortgage Intelligence with a platform to enhance its development offering to firms to springboard network growth and improve consumer outcomes.

“Mortgage Intelligence have always been about providing the best service for our firms and helping them grow. The use of InsureSight® has been an integral part of our strategy to do just this. Being able to sit down with Firm Principals and easily look through their protection data has been eye opening to us as a network as well as our AR firms. InsureSight® has given us the power to drive growth and improve protection practices.”

- Angela Davidson, Head of Protection