

MODULES

CRM

Capture, store and manage client and policy data, communications, meetings and project deadlines on the Customer Relations Management (CRM) module

FAIS Compliance

Managing the myriad of ever-changing legislative compliance is a challenge and Skye has been developed to assist FSP's to effectively manage this.

Competency Register

A simple and effective Competency Register to assist the FSP to manage the Fit and Proper requirements of its Representatives and Key Individuals

Human Resources Management

Employee Performance Management, Leave Management, Daily Tasks and Internship & Learnership Management

General Admin

A range of basic features are included on the system to enhance your Skye experience.

Upcoming Developments

- Astute Integration
- Skye Web
- Commission Tracking & Payroll
- Short Term Policy Schedule

FSP PRACTICE MANAGEMENT SOFTWARE

About Us:

Our vision is to develop a suite of innovative IT solutions with products that are the first choice for FSP's looking for effective and innovative technology for risk mitigation and increased productivity.

Our collective and united commitment to our clients, our core values, goals and vision is the driver that guides our business and which ultimately defines our success.

Skye's diverse and dynamic team are driven to provide service excellence and a software solution which is user friendly, simple to navigate and evolving to meet client and industry needs.

Skye has been awarded a tender by the **Insurance Sector and Training Authority (INSETA)** to support a limited number of FSP's in the insurance sector with full access to the **Skye FSP Practice Management Software** for 12 months from **1st March 2023 - 28th February 2024**.

This software includes all the below mentioned modules:-

- **Client Relationship Management (CRM)**
- **Document Management**
- **Compliance, Financial Needs Analysis & Record of Advice**
- **Competency Register**
- **HR & Practice Management**

Clients who elect to continue to using Skye after the 12-month duration will receive discount on their user license fees. Please contact **Chante** at chante@skyetek.co.za for more information.

BENEFITS OF USING SKYE

All-in-one Business Management Software

User - friendly interface

Affordable

Modular system for easy customisation

Microsoft Azure Cloud Server Storage

Excellent Customer & Sales Support

CRM

- Individual Clients & Business Clients
- Client Communication & Management
- Workflows
- Client & Policy Reviews
- Record of Advice
- Communication Templates
- Quick Notes & Reminders
- Client & Policy Transfer / Merge
- FNA Tools
- Clients Referrals
- Rep Scheduler
- Policy Schedule
- Gift register

HR MANAGEMENT

- Employee Management
- Compliance & Training Management
- Performance Management & Reviews
- Clock in / out
- Reports
- Report Builder
- Daily Register
- Leave Management

GENERAL ADMINISTRATION

- Telephone Messages
- User Tasks
- Data and Document Import
- Template Management
- Policy and Procedure Management
- Travel Log
- Financial Calculators
- User Security
- General Security
- Audit Trail and Status Change History

COMPETENCY REGISTER

- Competency register & training reports
- Skills Gap Audit & planned training

FAIS COMPLIANCE

- Compliance Reports
- Workflow Sign-Offs

CONTACT US FOR A DEMO OR QUOTE:



Phone

041 367 0357



E-Mail

chante@skyetek.co.za



Website

www.skyetek.co.za