

QSI Brokers is a financial services provider offering both long and short-term insurance and investments related services.

The main challenges faced by QSI brokers are the stringent reporting and compliance requirements introduced by the FIAS and FICA legislation governing the conduct of Financial Service Providers. The Financial Services Board monitors these compliance issues and requires annual reporting with archiving of relevant documents for long periods of time. FSPs should also track interactions (tasks) they have had with their clients and what the outcomes (advice given) on these issues are.

For QSI, Streamline has become key in the management of documentation and records. It helps manage an office of people, keeping record of what is being done, what requests are being handled and ensuring that the necessary turnaround times are maintained. Everything can be seen and tracked.

Being able to manage tasks and view what is happening and has happened with any client or staff member at any time, provides the QSI management with the tools to ensure that client needs are met. This is especially important with employees who work remotely – on the road or from home, it is easy to see what they are busy with and monitor the timeous completion of tasks.

The record keeping and document management aspects of Streamline, especially the allocation of tasks and documents to an address-book contact, ensures that compliance audits are easily managed with the necessary information available – no searching for files or paperwork to provide the documentary evidence required. The requirement of an off-site back-up is inherent with Streamline's online hosted solution.

Heila Nel, manager of QSI, goes as far as to say that she cannot run her business without Streamline. The Financial Services Board auditor was impressed with the solution they had in place as a result of Streamline and made their most recent compliance audit a hassle-free experience.

As a financial services provider, using Streamline to manage your business makes business sense.

[QSI Brokers](#)

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