

23 February 2021

Tech features no.1 for BT Panorama

For the third year running BT Panorama has been awarded ‘Best Mobile Platform’, ‘Best Client Portal’ and ‘Best Online Business Management’, in the latest *Platform Competitive Analysis and Benchmarking Report* from Investment Trendsⁱ.

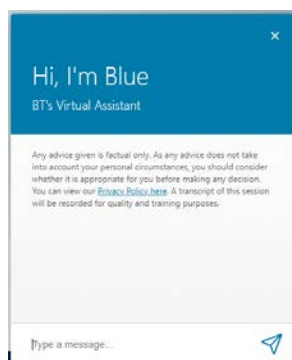
Managing Director, Platforms, Investments and Operations, Kathy Vincent said “The technology features of BT Panorama appeal to both advisers and their clients. It is about access and efficiency.”

Last year usage of the mobile app increased 166 per centⁱⁱ, with the highest number of unique visitors in a single day hitting 6,395 on 25 November 2020 triggered by the nine-month market high. The Digital Consent feature also saw a 31 per cent increase over the summer, indicating the traditional ‘slower months’ are no more as advisers and their clients connect to ensure market opportunities are not missed.

“We are always seeking ways to improve the online experience on BT Panorama, across both the adviser and client portal, and it is great to see this resonating.

LAUNCH OF “BLUE” CHAT BOT

“Earlier this month we launched a 24/7 online virtual assistant ‘Blue’, that supports advisers and their clients seeking immediate responses to common questions, step-by-step guides and connecting people to one of our specialised support teams. The chat bot is learning ‘on the job’ and last week alone helped over 900 people and responded to more than 2,000 queries,” said Ms Vincent.



MORE REPORT FINDINGS

Investment Trends’ in-depth research, conducted from August to December 2020, is based on detailed analyst reviews of 15 Australian investment platforms across 538 criteria.

In addition to BT Panorama’s three awards, Investment Trends also acknowledged a number of recent enhancements to the platform including: BT’s adviser portfolio tools for managed accounts, improved MDA functionality, the cash sweep facility, contribution splitting and individual HIN (iHIN) capability.

BT Panorama was also acknowledged in the report as providing best practice in investor correspondence, risk reporting and cash transactions.

Media Release



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“We know advisers vote with their feet and we have been pleased to welcome an additional 448 advisers, as well as a 46 per cent increase in new active accounts to BT Panorama in the year to 31 December 2020. Funds under administration increased 36.4 per cent to \$35.8 billion over the same period,” said Ms Vincent.

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ⁱ Investment Trends Platforms Competitive Analysis and Benchmarking Report, December 2020

ⁱⁱ The use of the BT Panorama mobile app increased 166 per cent from December 2019 to December 2020.