Adviser Self Service – New Business Pipeline for IFAs

Quick Reference Guide

What is the New Business Pipeline?

The New Business Pipeline gives you real-time visibility of your applications that are in progress, providing insights, improving efficiency and user experience.

How to Access the New Business Pipeline

1. Log in to your Adviser Hub.
2. Select "New Business Pipeline" from the navigation menu.
3. The pipeline will open in a separate browser tab.

Key Features & Navigation Tips

- **Dynamic Search Capability:** Easily locate policy information by customer name or policy number.
- **Real-Time Data:** Data is refreshed every time you access or refresh the page.
- **Device Compatibility:** Use on desktop, tablet, or mobile. For best experience, use desktop or tablet in landscape mode.
- **Switching Tabs:** The pipeline opens in a new tab. Switch back to Adviser Hub using your browser tabs.
- **Sorting:** The "Age" column groups by age ranges for easier analysis. Other columns sort by unique values.
- **Outstanding Requirements:** Shows all requirements for pending applications.
- **Email integration:** Click an email address in the portal to open Outlook with the address pre-filled.
- **Screen Issues:** Maximise your browser or zoom out (Ctrl + - or Cmd + -). If the issues persists, try a different browser or device.
- **Pop-up Blocked:** Enable pop-ups for the portal site in your browser settings.
- **Loading Time:** Expect 15–20 seconds for data to load, depending on your internet connection.

Frequently Asked Questions

Can I generate a policy schedule?
No, you will receive as per the current process.

Can I add notes to policies?
No, but we are investigating the ability to close or action outstanding requirements in the future.

Can I identify all my customers that have a particular outstanding requirement?
We are considering insights and reporting to enable you to identify types of outstanding requirements.

How can I see multiple policies for a client?
Each policy type is treated separately.

Will I see updates to the outstanding requirements in real time?
Yes, as our teams action any updates these will be reflected in your data view.

Support & Troubleshooting

Technical issues:
Contact Chubb IT support hotline **0800 103131**

Application or policy issues:
Call the Chubb Contact Centre Helpline **0508 464 999**

Resources

Refer to Adviser Self-Serve instructional video

For further support, contact your BPM.

If you require further support please contact the Chubb New Business Team
newbusiness.nz@chubb.com

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