

The Problem

20 Days

AVG time it takes for an agent to complete carrier onboarding

\$25,773,759

Total regulatory action fine amounts in US Dollars last year

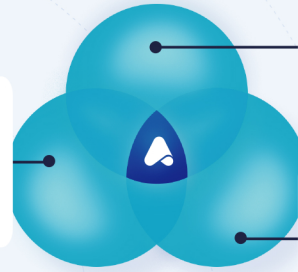
67%

AVG Agent retention rate (trailing 12 months)

The Solution

Carrier must file state Appointment(s) for the producers that are appointed to sell their products.

*Requirements vary by state



Producer must hold both an active License in the Customer's operating state(s) & the producer's resident state

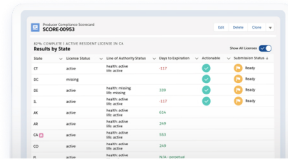
Producer must be authorized to transact the appropriate Line(s) of Authority - ex: Property, Casualty, Health, Life, etc

Features



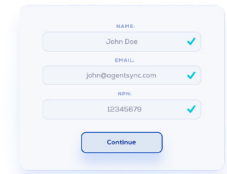
License, Appoint, and Terminate Directly From Salesforce

Take licensure or appointment remediation one step further by automatically applying for missing licenses, lines of authority, or appointments based on Compliance Scorecard results.



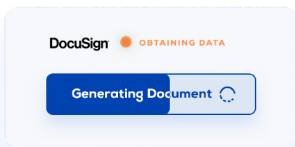
Automatically-Generated Compliance Analysis Through Scorecards

As soon as a producer is assigned to a Producer a scorecard is generated identifying any gaps in compliance.



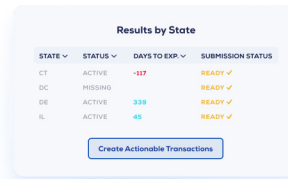
The Agent Record Imported with NIPR

All information synchronized using NPN (national producer number)



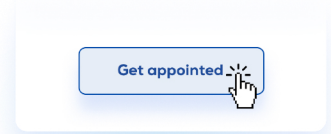
Automated Agent Contracting

In one click, or as part of an automated workflow, generate producer agreements via DocuSign auto populated with Agent & Agency info, W9, and E&O Policy captured during onboarding.



The Producer Sync

AgentSync is powered by a direct integration to NIPR that essentially makes a copy of all your producers' contact info, licenses, appointments, and even regulatory actions.



System Implementation

Basic setup is completed in days not months and can be deployed within an existing Salesforce environment or as a standalone if you are not currently on Salesforce.



Distribution Channel Management

Your producers' data lives in Salesforce enabling you with the advantage of powerful reporting and analytics. NIPR data is normalized and organized into a digestible data model.



The Agent Portal

All producers can login to view their licenses, carrier appointments, upload documents, update their contact info, etc.



Data Security & Privacy

Built on the Salesforce® platform & fully reviewed & approved by their security team your data is as safe as it gets.



5.0 Average Rating



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