

agentsync **Autopilot** **Your Managed Services Solution**

Let our team of experts manage your compliance coverage. With AgentSync Autopilot, you can spend more time managing your business, trusting the AgentSync Autopilot team to manage your licensing and appointment needs.

The Autopilot team partners with your team to ensure your licensing and appointment requirements are met. Our experts act on your guidance to quickly scale licensing and appointment coverage for your producer channels. We also provide reports and dashboards, as well as email alerts on an as-needed basis to inform your team of progress and give you a transparent data overview. Our easy integrations put other tools, like DocuSign and Verified First, to work streamlining your processes such as contracting and background checks, further increasing your speed to sales.

Skip the challenges of new tech

Learning new software while navigating various state compliance nuances can be daunting. These hurdles add challenges to growing and scaling your business. Our team leverages the AgentSync platform – built on Salesforce and integrated with NIPR – with our insurance know-how to quickly and accurately manage your compliance needs.

If you want a streamlined process to onboard new producers, collect their information, and get them licensed and appointed as quickly as possible, but you're not sure your team has the time to make it happen, Autopilot is here to help. Put our insights and experience to work for you.

Features



Automated **licensing and appointments**, with a hands-on partner to apprise your team of updates and changes



Tracking for **continued education** and affiliations all on one platform



Quick, effective scaling for **producer channels** with more time to hand back to sales



Speedy, painless **terminations and off-boarding**



Established **feedback channels** between AgentSync and your team to fine tune compliance processes and provide necessary updates as we go



Background check processing in bulk, using our Verified First partnership



Support and training for internal stakeholders and producers as we work to add their licenses and appointments

Excited to see AgentSync in action?