

## The Problem

**20 days**

Average time for an agent to complete carrier onboarding

**\$25,773,759**

Total of regulatory fines in U.S. dollars last year

**67%**

Average agent retention rate (trailing 12 months)

## The Solution

- ✓ Ensure quick and accurate compliance across the board
- ✓ Carrier must **file state appointments** in most states for the producers selling their products
- ✓ Producer **must hold active licenses** in the client's operating states *and* the producer's resident state
- ✓ Producer must be **authorized to transact** the appropriate lines of authority (health, life, P&C, etc.)

## Features



### License, Appoint, and Terminate In App

Automatically apply for missing licenses, lines of authority, or appointments in bulk, taking your onboarding from weeks to days. Use this shortened timeline to take advantage of Just-In-Time appointments and save thousands in state fees.



### Automated Agent Contracting

In one click or as part of an automated workflow, generate producer agreements via your contract software, auto-populated with agent and agency information, W-9, and E&O policies captured during onboarding.



### Distribution Channel Management

Your producers' data lives in your client relationship management system, giving you powerful reporting and analytics, with NIPR data built in for easy, understandable viewing.



### Compliance Analysis Through Scorecards

Automatically generate a Compliance Scorecard of all producer appointments and licenses for various lines of authority to identify gaps in compliance.



### 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, synchronized daily using national producer numbers.



### The Agent Portal

A self-service portal, branded to you, allows agents to log in to view their licenses, carrier appointments, upload documents, update their contact info, etc.



### Downstream Integrations

Easy integration means updated contact information and licensing synchronizes daily across all relevant applications from client relationship management to policy administration system.



### System Implementation

Basic setup is completed in days not months and can be deployed within Salesforce *or* as a standalone if you are not a Salesforce customer.



### Data Security & Privacy

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



**5.0**

Average Rating



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