AgentSync for MGAs

agentsync

AgentSync merges **cutting-edge technology integrations** with high-level insurance industry knowledge to revolutionize every part of the insurance producer lifecycle. Let us help you **align compliance with growth** for an organization built to flourish.

Features

License, Appoint, and Terminate In App

Take your onboarding from weeks to days with bulk license and appointment lookups.

Automated Agent and Agency Contracting

In one click or as part of an automated workflow, generate 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, and automate renewal notifications to producers and agencies.

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 or agencies 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** ★★★★★ Read all our reviews on the Salesforce Appexchange

TRUSTED BY beam Hippo *Lemonade* coterie **& MANY MORE!**