

AutoPilot: The hands-off approach to rapid and risk-free growth

AgentSync AutoPilot partners with rapidly growing carriers to streamline compliance management and scale quickly.

AgentSync AutoPilot for Carriers

Managing insurance compliance can be frustrating, labor intensive, and expensive. That's only exacerbated when scaling your business. With more producers to onboard and appoint, navigating state compliance nuances and ensuring both accuracy and timeliness of fulfilling appointments can take armies of people. Data accuracy issues and appointment backlogs are inevitable.

AgentSync's best-in-class technology was built to solve just this problem.

With AutoPilot, our industry experts leverage our technology to build a compliance strategy uniquely tailored to each customer. Whether you plan to grow within existing states or expand into new ones, our team is here to eliminate compliance-related complexity and risk so you can spend more time growing your business.

- ✓ **Quick onboarding and appointments**
End-to-end producer onboarding and appointment processing in under a day on average.
- ✓ **Unparalleled partnership**
Our experts are an extension of your team and will respond in under 24 hours (with an average response time of 3 hours).
- ✓ **Risk-free compliance**
We're so confident in our people and technology that we guarantee our accuracy. If we make a mistake, we'll pay!
- ✓ **Unbeatable pricing**
With the automation and efficiencies that our tech brings, AutoPilot is cost-efficient and cost transparent.

Features



Transparent data & reporting

Our always-on reports and dashboards provide line-of-sight to your regulatory status. Drop them into your executive presentations or pass along to internal stakeholders.



Strategic automations

Send automated reminders to producers when they need to submit background checks, documentation, provide proof of citizenship, or complete continuing education courses.



Just-In-Time (JIT) appointments

We'll help you save time and money on state fees in JIT states by holding off on producer appointments until that producer writes business.



Background checks

We can set up integrations with most background check providers to streamline background check processes, further increasing speed to sales by eliminating swivel chair system logins.