

AgentSync Manage For Carriers:

Streamlining distribution channel management and compliance

AgentSync Manage eliminates compliance-related complexity in distribution channel management processes for leading insurance carriers.

AgentSync Manage

Without the right technology, keeping up with producer and agency data, as well as state regulatory requirements, when managing distribution partner eligibility for onboarding, appointments, and terminations can be impossible to handle at scale.

Businesses rely on legacy systems that repeatedly fail to create the efficiencies necessary to differentiate themselves against competitors.

Think: multiple system logins, unnecessary down time, redundant data entry, and so much paperwork.

With Manage, your team gets the technology they need to drive efficiencies in distribution management workflows. Whether you're looking to grow your business, create an exceptional producer experience, prevent regulatory violations, or a bit of everything, Manage takes your producer management and compliance workflows to the next level.

✓ Exceptional distribution partner experience

Build a frictionless and modern distribution partner experience by getting them appointed and ready-to-sell quickly and efficiently.

✓ Data intelligence

Your single source of truth on your distribution channels, consolidating key compliance data into easy-to-use and actionable reports and dashboards.

✓ Real-time, integrated compliance

We bake state-by-state requirements in your workflows and keep an audit trail of your actions to prove each submission is accurate and timely.

✓ Strategic automations

Send reminders to distribution partners when they need to submit background checks, documentation, or complete continuing education.



TAILORED ONBOARDING PORTAL

Distribution partners can view their licenses, appointments, update their information, complete background checks, and upload documents.



JUST-IN-TIME (JIT) APPOINTMENTS

Save time and money on appointment fees by holding off on appointments until producers write business.



UNBEATABLE PRICING

With the automation, efficiencies, and accuracy that our tech brings, Manage is cost-efficient and cost transparent.



UNPARALLELED PARTNERSHIP

Our experts are an extension of your team and will respond in under 24 hours (with an average response time of three hours).