

Manage: Streamlining producer management and compliance

AgentSync Manage partners with MGAs to eliminate compliance-related complexity in the producer management process.

AgentSync Manage for MGAs

Managing insurance compliance can be frustrating, labor intensive, and expensive. Without the right technology, navigating state compliance nuances and ensuring both accuracy and timeliness of onboarding, licensing, appointments, and terminations can take armies of people. Data accuracy issues and backlogs are inevitable.

AgentSync's best-in-class producer management solution was built to solve just this problem.

With Manage, your team gets the tools they need to drive efficiencies in producer management workflows. Whether you're looking to grow your business, minimize producer management costs, prevent regulatory violations, or a bit of everything, Manage is here to help you take your producer management to the next level.

- ✓ **Quick onboarding, licensing, and appointments**
Manage producer requirements through your single end-to-end compliance solution.
- ✓ **Distribution channel management**
View up-to-date producer data, including contact info, licenses, appointments, and regulatory actions.
- Unbeatable pricing**
- ✓ With the automation and efficiencies that our tech brings, AgentSync is cost-efficient and cost transparent.
- Unparalleled partnership**
- ✓ Our experts will respond in under 24 hours (with an average response time of 3 hours).

Features



Strategic automations

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



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.



Tailored agent portal

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



Transparent data & reporting

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