

Manage: Streamlining distribution channel management and compliance

AgentSync Manage eliminates compliance-related complexity in producer management processes.

AgentSync Manage

Insurance compliance can be frustrating, labor intensive, and expensive, particularly when you're working to get producers onboarded and ready to sell. 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 solution was built to solve just this problem. With Manage, your team gets the tools they need to drive efficiencies in distribution channel management workflows.

Whether you're looking to grow your business, decrease operational costs, prevent regulatory violations, or a bit of everything, Manage is here to help you take your distribution channel management to the next level.



Ready-to-sell

Manage producer requirements through your single end-to-end compliance solution, quickly getting them onboarded, licensed, and appointed.



Unbeatable pricing

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



Reporting and visibility

Your single source of truth consolidating producer data – including licensing status, requirements, and rules of engagement.



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).



STRATEGIC AUTOMATIONS

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



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.



JUST-IN-TIME (JIT) APPOINTMENTS

Save time and money on appointment fees by holding off on appointments until the producer writes business.

