Salesforce & AgentSync partnership

AgentSync partners with Salesforce to eliminate compliance-related complexity in the producer management process delivered on the world's #1 CRM platform.

Salesforce and AgentSync

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 on Salesforce's world-leading CRM platform to solve just this problem.

AgentSync's core offering, Manage, built on Salesforce.com, is used by the fastest-growing insurance companies in the US to effortlessly streamline end-to-end producer management processes. Providing a secure, customer-centric experience, AgentSync operates within Salesforce's highly-protected platform where you can scale quickly and rapidly iterate.

✓ Industry-leading partnership

By working with two industry leaders that have come together, you are ensured continued business growth, product development, and best-in-class customer service.

✓ Quick onboarding, licensing, and more

Manage producer requirements through your single end-to-end compliance solution.

✓ Easy, seamless implementation/integration

AgentSync's infrastructure on Salesforce challenges the status quo, allowing you to smoothly and continuously push data upstream and downstream on a highly secure platform.

✓ World-class customer service

Upholding customer trust, value, and delight, AgentSync has all 5-star reviews on Salesforce AppExchange for notable automation and license compliance management.

SALESFORCE CLOUD-BASED SERVICES
Compatible with Salesforce Financial Services Cloud and Sales/Service Cloud, you can utilize intelligent automation to customize and simplify end-to-end producer management and compliance while gaining valuable customer insight.

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.