



Vertafore™

Unleash your potential

Producer Lifecycle Management

FOR CARRIERS



“Using the producer lifecycle management platform, turnaround time for onboarding our producers has been slashed by 80%—to just three days from 15 days. From the point we hit the ‘go’ button with the application to the point we send back the appointment can be as little as 24 hours.”

— David Jones, Assistant VP, Producer Compensation and Licensing Services, OneAmerica

Producer Lifecycle Management

Trial Tested. Stronger than Ever.

The lessons of the past years have taught us that successful companies are nimble, cost conscious, and forward thinking, even in the best of times. Honing strategies in good times means preparedness for whatever the market or the regulators may bring. The most agile companies are committed to investing in core technologies that deliver automation, process improvements, and in turn, hard cost savings. When hardship strikes, these are the businesses that move forward unwaveringly, never missing a beat.

Many of the companies that make success look effortless are supported by the industry's leading distribution management partner—Vertafore. These companies have succeeded where others failed because they reduced needless steps and costs while streamlining compliance requirements. They have brought in more revenue and avoided penalties and missed business opportunities that bogged down their less efficient competitors.

At Vertafore, we're committed to supporting the growth and success of our carrier clients. We believe that less time spent juggling administrative tasks, less time wasted on manual data entry, and less staff solely devoted to keeping agents properly credentialed means more time to focus on what really matters—your business and your clients.

Our producer lifecycle management product line is the most advanced, intuitive, yet easy-to-use, on-boarding and producer data management system available today. We deliver on-demand access to all 50 state departments of insurance from the convenience of your browser. Electronic forms facilitate seamless communication between agencies and producers. We facilitate multi-state license and appointment processing and response delivery. Processes that originally took weeks are reduced to days and hours with Vertafore's "hands-off" processing. We are committed to automating repetitive tasks, yet remain flexible enough to grow with your business without requiring additional staff. Vertafore producer lifecycle management offerings are the choice of carriers from coast to coast, large to small in both the life and health and property and casualty segments. We think it will be your choice too.

Efficient. Dependable. Proven.

And ready when you are.

Doing the same thing over and over and expecting different results? Let us help.

Vertafore delivers 100% paperless compliance processing to companies large and small, granting anywhere, anytime access to producer data management and agent on-boarding. We've built our business on providing flexible automation and shortening processing times with states, all to accelerate your time-to-revenue. With Vertafore producer lifecycle management, you can license, appoint, and on-board producers in any state, from one secure online location, instead of being forced to visit 50 separate state websites. Our core modules are tightly integrated so that complex insurance regulation management is simplified. At Vertafore, we save you time so that you save money and reach your revenue goals faster. Compliance? Easy.

Vertafore producer lifecycle management is packaged so you get all the capabilities you need, without paying for functionality you may not use. **Choose the “edition” that best fits your needs:**

	Compliance Express®	Producer Manager™	Producer Express®
Fast Producer Licensing & Appointing	✓	✓	✓
Producer Credentials and Relationship Management		✓	✓
On-boarding and Connectivity			✓

Producer Lifecycle Management

Compliance Express

Fast producer licensing and appointing

One-stop licensing and appointing

Process licensing and appointments in all 50 states from the convenience of your web browser.

Faster, easier and fewer errors

Whether you're hiring or retiring a large class of producers, we can add speed and accuracy to your producer data process with bulk data acceptance. All you need is a spreadsheet and a click of the mouse, and you can put an end to re-keying data and associated errors.

Accurate data, reduced delays

Inaccurate producer data slows down state processing times and stops your revenue-generating producers in their tracks. Relying on accurate data from the start ensures streamlined state processing and your producers never missing a beat. Vertafore connects you directly to the National Producer Database (PDB) for integrated, trusted data imports. Accessing your producer data via the PDB allows you to easily confirm licenses, lines of authority, agency associations, appointment history, demographic information and more.

Increased visibility, stronger audit trails

Transaction-level reporting helps you determine, at a glance, which agent or cost center incurred associated expenses throughout a given time period, so you're not left scrambling at the end of the month.

Getting started

Contact your Vertafore account executive at 877.876.4450 for a custom assessment and determine which configuration will work best for your company. Convenient monthly billing simplifies your month-end processing and bolsters your audit trail.

With Compliance Express automating your licensing and appointing, you can:

- Confirm your agent licenses, appointments, associations, and demographic information easily, without ever having to leave Vertafore, through integrated PDB access
- Easily enforce electronic document signatures and simultaneously eliminate the cost and delay associated with shipping packets
- Receive instant notification via email when your agents' application or renewal status changes with the state, using Message Center
- Allocate associated transactional fees to customizable cost centers
- Maintain your business rules with convenient roles-based security features

Producer Manager

Producer credentials and relationship management

Record, confirm, and store accurate producer records

House all relevant producer data in one central, up-to-date records repository and rules engine. Maintain and manage producer records including licenses, appointments, lines of authority, firm associations, external system IDs, agreements and contracts, and notate business unit interest in shared producers.

Holistic compliance management the easy way

Instantly access the most up-to-date rules and regulations on a state-by-state basis. Easily enforce valid licenses, lines of authority, appointments, compensation hierarchies and termination types by jurisdiction.

Instantly determine sales authorizations

Determine at a glance if producers are legal to sell at the product level with state-based product authorizations.

Gain enterprise-level insight

Achieve increased visibility into sales authorizations, upcoming renewals, associations, background investigations, continuing education requirements and more, via our convenient reporting.

End manual data entry for good

Save time and eliminate keystrokes by automating agent data synchronizations with the National Producer Database (PDB). Syncs are available at the push of a button, or on a schedulable basis.

Achieve powerful integration with in-house systems

Leverage trusted producer data by letting Vertafore feed downstream systems and eliminate manual data entry, while bolstering your audit trail.

Getting started

Contact Vertafore at sales@vertafore.com or call 877.876.4450 for a custom assessment and determine which configuration will work best for your company.

With Producer Manager automating your producer management, you can:

- Instantly determine which of your producers are authorized to sell which products, in what states, through which agencies
- Easily track all statutory companies to which producers are appointed
- Set-up and maintain roles-based security, controlling access to administrative menus, demographic information, data deletion, and data corrections
- Leverage trusted PDB data to feed legacy systems and eliminate manual data entry through proprietary One-click Compliance™

Producer Lifecycle Management

Producer Express Producer On-boarding and Connectivity

Uncomplicate the signing process and capture more business

Our flexible automation allows you to mirror your current on-boarding process and remove the paper and delays. The result is a faster, more efficient sourcing-to-hire process that eliminates the gambles caused by delays, manual data entry, and lengthy packet-in-hand situations.

Quicker recruit-to-hire

Vertafore streamlines the sourcing, recruiting, contracting, and hiring process by automating the steps involved in finding and hiring new producers.

The end of paper packets and painful processing

Save time, manual data entry, shipping costs, and processing delays with our automated e-forms. Enter data once, then enjoy the peace of mind associated with our “once-and-done” process. Data is automatically filled into duplicate fields and forms, then automatically routed where it needs to go, following the customized workflows you dictate.

Initiation the easy way

Instantly kick-off information requests to your agency partners. Because Vertafore leverages universal ACORD™ standards, you know packets will include the necessary information the first time.

Streamlined workflow equals hard cost savings

Eliminating redundant efforts means a leaner, more flexible organization, poised to take on any challenge it may face.

Better decisions through better data

Instantly determine the productivity of your distribution channel operation through reports on contracting packet details, production activity, workload management, and packet milestone history.

Getting started

Contact your Vertafore account executive at 877.876.4450 for a custom assessment and determine which configuration will work best for your company.

With Producer Express automating your producer on-boarding, you can:

- Become “easier to do business with” by leveraging the latest in automated recruiting, contracting, and hiring; bringing on and keeping the best agents
- Act quickly and decisively on new potential producers
- Integrate seamlessly with back-office systems, using secure web services to transmit packet data, recruiting hierarchies, and complete packet PDFs
- Bolster your audit trail and avoid compliance gaffs with electronic, reportable processes

The path to productivity

Today's complex regulatory climate demands core technologies that work with your business, not in spite of it. While other providers may try to force heavyweight systems that simply don't meet your needs, we've tailored Vertafore producer lifecycle management to provide exceptional compliance, credentialing, and producer data management, to all companies seeking a sustainable competitive edge.

We developed our producer lifecycle management platform to scale as you grow. Our module-based add-ons work with each component of the platform to supplement existing functionality, so you're assured a flexible solution that meets your specific needs. When you are ready to move to a more advanced edition, our experienced account management team can help guide you through that process.

The peace of mind that comes from a true partnership

Since 1997, we have partnered with state regulators, agencies, CE providers, individual producers, and carriers through our industry-leading producer lifecycle management solutions. Our focus is, and has always been, connecting each of these industry stakeholders, electronically, making communication faster and easier. Because we serve each of these stakeholders simultaneously, we are uniquely positioned to serve each industry segment better than anyone else in the industry. For you, this means partnering with a provider that has the background, know-how, and the full-picture vision to help you find the best path to productivity and growth. We serve more stakeholders in the insurance industry than any other provider, viewing each of those relationships as a partnership.

Find out more

We understand that *your* business is different. Having served over 1,600 carriers, we know that no two companies are ever completely alike, so we take the time to learn about yours before talking too much about ours. For more information on producer lifecycle management for carriers, please visit vertafore.com/sircon or give us a call at 877.876.4450. We look forward to learning more about your company so we can help meet your business goals.

“Vertafore was instrumental in helping us automate and centralize our licensing operation. They not only provided technical support, but moral support as well.”

— Tommy Hutchins, Business and Technology Analyst, Strategic Project Management,
Infinity Property & Casualty





Vertafore

Unleash your potential

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Vertafore is the leading provider of software and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 17,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.