



# Sircon® Producer Express®

## Data Sheet

### Do your marketing partners or distributor network think your company is easy to do business with?

Insurers commit millions to earn and protect their good reputation with policyholders, investors, and the public. But think for a moment about the people who sell your company's products and bring in the revenue. What is your reputation with them?

High-volume agents will tell you that they prefer to write business for carriers who make the writing process easier. Preferred writing companies don't swamp agents with paperwork at signing time, and they keep them updated of activation progress. They get the compensation hierarchy right the first time. Most importantly, they get their agents appointed rapidly, so they can start selling right away.

Sircon® Producer Express® helps carriers manage the onboarding process—from recruiting to contracting to appointing—by streamlining and automating the various steps in finding and acquiring a new producer. It delivers more flexibility and responsiveness, while enhancing the capabilities of the licensing and appointing department to act quickly and decisively on new producers. The net results are quicker recruit-to-hire, streamlined workflow, reduced costs, and increased revenue.

### Quick and Easy

Hot producers with business in hand don't want a complicated signing process. The time from the first contact to the appointment simply takes too long. Missing information results in substantial re-work expense and delay. Paper-based systems force manual re-entry of producer data into other carrier systems, not to mention the out-of-control overnight shipping charges. The list of challenges is daunting, yet sales force expansion is fundamental to helping carriers achieve their sales goals.

Producer Express automates the interaction between producers, distributors, and carriers to increase the volume, speed, and accuracy of activating new producers. It accommodates all onboarding scenarios, such as paper-form entry, recruiter- or home-office initiated, or agency recruitment.

### Recruitment

Leads are generated from a website or from online job boards like Monster, Hot Jobs, or Career Builder, and are tracked for various events like first contact, follow-up date, first and second interview, and the date the lead was moved to the hiring, contracting, or appointing process. This data is then passed to hiring, contracting, and appointing.



### Optional Product Features

- Candidate management
- Job board integration
- Carrier business opportunity lead form integration
- Candidate lead routing rule support
- Escalation rules support
- Contact tracking
- Interview tracking
- Automated integration with the main contracting module
- Carrier portal connector
- Single sign-on support from carrier portal
- Secure web services requests, alerts, and work queue count support

#### Other data that can be tracked includes:

- The recruiter
- Their manager
- The source of the lead
- The method of receiving the lead
- Current license status of the applicant

## Automated Processing

Producer Express helps streamline the process of collecting the documents required for onboarding new producers by electronically transmitting automated forms for background investigation, licensing status verification, and state appointment processing between remote locations and the home office. The service electronically submits onboarding information to the states to process regulatory transactions. Forms passed between remote locations and the home offices are automated and checked for completeness, and can be signed and countersigned digitally. No more wondering what happened to a contract packet, either. With Producer Express, you can track your paperwork from contact to contract to impact. Event-driven email or portal notifications provide updates to all parties.

#### Base Product Features

- Direct and indirect request initiation
- Express invite provides a single, integrated solution for data-entry
- Support for ACORD standards and document attachments to initiate requests from distributors using a proprietary system
- Support for automation of the data in paper packets
- Document packets and intelligent forms
- Express packet groups all required documents together for easy processing

- Express interview eliminates redundant data-entry while simplifying forms that producers often find confusing
- Required fields and data validation
- Business rules support
- Automated mapping of data into print-ready, PDF-rendered forms

#### Flexible Integration

- Secure web services integration for packet data, users, recruiting hierarchies, request routing information, and complete document packet PDFs
- Integration with Producer Manager for advanced producer lifecycle management and reporting
- Custom integration options available
- Reporting capabilities
- Flexible search criteria
- Automatically start an onboarding request from your CRM system (Salesforce, MS Dynamics, etc.)

#### Flexible and Automated Process Workflow

- Packet-based process control provides high flexibility
- Channel-based and general request queues
- Exception queues
- Request assignment and reassignment support
- Escalation rule support
- Role-based permissions
- Integration with internal systems for complete process management
- Agent electronic signatures via partnership with DocuSign
- Signature rollback and audit trail functionality
- Integrated licensing and appointment processing
- Integrated Compliance Express® appointment processing

- Link to Compliance Express license application and renewals
- Integrated background investigation requests with national background check firms
- Automated PDB data reconciliation
- Links to FINRA WebCRD, OFAC site, and producer debt tracking sites

#### Letter Templates

- Templates for appointment notification, welcome letters, and denials
- Mail-merge style automation
- Letter content customizable at run-time
- Email submission with attached PDF
- Courtesy copy to recruiting organization

#### User and Roles Management

- Add and manage users
- Add and manage user roles and permissions
- E-mail notification and confirmations
- Event-driven support for email notifications and confirmations, including express invites, welcome letters, and appointment notifications
- Alerts for failures, escalation, assignment, and reassignment

#### Web-Based and Web-Hosted

- Installation, configuration, and upgrades are managed by Vertafore
- Application runs on multiple clustered application servers
- Application runs in 128-bit SSL mode for secure communications
- Data feeds are all secure XML-based web services for interoperability
- Physically separated standby/disaster recovery environment

For more information on Sircon Producer Express, contact us at 877.876.4430 or visit our website at [sircon.com](http://sircon.com).

