



Sircon[®] Solutions

For Carriers



“Using [Sircon], turnaround time for onboarding our producers has been slashed by 80%—to just 3 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



Trial Tested. Stronger than Ever.

Sircon® Solutions to Get and Keep Agents Authorized to Sell

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 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. Vertafore's involvement allowed these companies to avoid penalties and missed business opportunities, resulting in increased efficiencies and revenue.

At Vertafore, we're committed to supporting the growth and success of our carrier clients. We believe that by spending less time juggling administrative tasks and performing manual data entry, and by limiting the resources dedicated to agent credentialing, you can focus on what really matters: your business and your clients.

Sircon solutions combine leading compliance software and flexible outsourcing services that dramatically reduce the risk of noncompliance, speed time-to-market, and improve service to the insurance community. Sircon services are the most advanced and intuitive onboarding and producer data management processes available today.



To ensure that your producers get and stay authorized to sell, we deliver on-demand access to all 50 state departments of insurance from the convenience of your Internet browser.

Flexible interviews and electronic signatures improve the agent experience and speed communications. We facilitate multistate 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 as well as providing services to complete these tasks for you. Vertafore 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.

Complete. Connected. Compliant.

Sircon is Ready When You Are

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

Vertafore delivers distribution management processing to companies large and small, granting any-where, any-time access to producer data management and agent onboarding and license processing. We've built our business on providing flexible automation services that shorten processing times with states, all to accelerate your time-to-revenue.

With Sircon software and services, you can license, appoint, and onboard producers in any state, from one secure online location, instead of being forced to visit 50 separate state websites. Whether you manage producer authorizations in-house or you outsource some or all of your regulatory activities, our offerings 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.

Get Authorized, Stay Authorized



Fast Producer Licensing and Appointing

Sircon Compliance Express

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 reentering 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. Sircon 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.

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 role-based security features.

Producer Credentials and Relationship Management

Sircon Producer Manager

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.

Take advantage of just-in-time authorizations

Reduce costs and decrease quote-to-issuance cycle time by leveraging “just-in-time” authorization. Meet complex state rules and reduce the risk of errors and violations. Apply consistent processes to ever-changing authorization rules and eliminate manual processing of routine tasks and focus on exceptions.

Turns a “no” into a “yes”

Receive a simple yes or no answer to the question, “Is this producer authorized to sell?” by checking licenses, lines of authority, and appointments. Turn a “no,” into “yes,” with automated processes to correct authorization failures.

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.

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.

Support sales and marketing

Gain insight into information that can drive marketing and sales strategies and product delivery approaches. Ensure that the right producers are available to sell the right products at the right time to support sales goals. Address problem areas proactively with access to statistics on authorization requests by product type, state, authorization result, and error condition.

Achieve powerful integration with in-house systems

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

With Sircon Producer Manager automating your producer management, you can:

- Answer the question, “Does this producer have the right licenses, lines of authority, and appointments for the particular sales event he or she is performing?”
- Eliminate manual processes of routine tasks and reduce quote-to-issuance cycle time.
- Automate the processes needed to correct authorization failures and turn a “no” into a “yes.”
- Leverage trusted PDB data to feed legacy systems and eliminate manual data entry.
- Make adjustments to ensure that sales force coverage supports marketing’s product rollouts and carrier sales goals. Licensing services and sales departments can work together and support each other’s efforts.
- Interpret just-in-time authorization rules by state and configure whether state registered affiliations are permitted in lieu of an appointment.
- Set up and maintain role-based security, controlling access to administrative menus, demographic information, data deletion, and data corrections.

Producer Onboarding and Connectivity

Sircon Producer Express®

Simplify the signing process and capture more business

Sircon automation allows you to mirror your current onboarding 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

Sircon 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 and reduce manual data entry, shipping costs, and processing delays with our automated e-forms. Enter data once, and 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 in the Sircon solution, 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, workload management, and packet milestone history.

Contact your Vertafore account executive at 800.444.4813 for a custom assessment and determine which configuration works best for your company.

With Producer Express automating your producer onboarding, 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.

Expert Outsourcing and Project Resources

Licensing and Registration Services

Understanding how to onboard and keep your producers authorized to sell takes substantial expertise. The complexities of the process mean greater risks to your business and reputation, only increasing the cost of that expertise. Vertafore provides industry-leading automation coupled with best practices executed by our producer lifecycle management experts we call Licensing and Registration Services (LRS). LRS allows your staff to focus on supporting your customers, while we take care of everything else.

Special projects

Have you recently been through a merger or an acquisition? Are you rolling out a new product? Are you trying to reduce appointment renewal fees? The expert team at Vertafore offers short-term assistance with these and other compliance-related projects. Let us manage these time-consuming and paper-intensive projects for you, so you can focus on what you do best.

Outsourcing

Our experts know what it takes to complete the necessary transactions that get and keep your sales staff authorized to sell. That's why we've created the Get Authorized and Stay Authorized service packages, specifically designed to meet your company's producer authorization management processing needs. You can even customize a package that meets your unique needs. Sircon experts use our own award-winning software to deliver a complete, connected, and compliant solution to keep your sales staff focused on selling. No matter what you choose, you can rely on the expertise of a company that has been leading licensing and compliance initiatives for over 15 years.

Get authorized

- Resident and non-resident licensing
- Background investigations
- Appointments
- Affiliations
- Contracting
- And more

Stay authorized

- Continuing education tracking
- License renewals
- Name and address changes
- Producer reconciliations
- Terminations
- Appointment renewals
- Credit monitoring
- And more

Consulting

With best-practice compliance improvement, you gain experience and insight from Sircon experts. We work together with your in-house compliance team to find a solution to your licensing and registration-related issues. Best-practice engagements are tailored to address your specific compliance situation and needs, and are guided by a three-step process methodology: Discovery, Analysis, and Recommendations. Through this approach, you can expect dramatic improvements in your compliance operation.

“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*



The Path to Productivity

Use effective producer management to grow and stay compliant.

Today's complex regulatory climate demands a combination of technology and services 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's Sircon solutions to provide exceptional compliance, credentialing, and producer data management to all companies seeking a sustainable competitive edge.

We developed our Sircon solutions to scale as you grow. Our flexible service solutions work with in your business processes to supplement existing functionality, so you're assured a flexible solution that meets your specific needs. When you are ready to explore additional Sircon solutions, 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, carriers, agencies, education providers, and individual producers through our industry-leading Sircon solutions. Our focus is connecting each of these industry stakeholders, 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. We serve more stakeholders in the insurance industry than any other provider, viewing each relationship as a partnership. 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 understand that your business is different. Having served more than 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 Sircon solutions for carriers, please visit vertafore.com or call us at 800.444.4813.



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