

Vue Distributor Accelerator Suite

Vue's technology modernizes the distribution management for MGA's, FMO's, IMO's, and Insurance Distributors who have outgrown their current tools to automate the producer administration and sales processes. Vue Distributor Accelerator Suite is a platform designed for a distributors business that is flexible, scalable, and configurable to meet the business requirements of distribution. Seamlessly process electronic onboarding, contracting, compliance, compensation management with a easy-to-use self-service portal including performance analytics.

Vue Contracting & Compliance, Vue Compensation, and Vue CRM for Insurance Distributors are tightly integrated modules in the Vue Distributor Accelerator Suite.



"By using Vue as part of our proprietary technology platform, our agents will operate in a seamless multi-carrier environment that will feel like they are working with a single carrier for everything from quoting, to electronic applications, application tracking, managing compensation, and managing their client base. This provides a unique offering for an independent career agent that delivers a tremendous advantage in the marketplace."



Built for distributors, specifically for insurance

Vue Distributor Accelerator Suite for MGA's, FMO's, IMO's, Brokerages and Insurance Distributors provides the tools to modernize and optimize your sales channel strategies. This includes modules for Vue Contracting & Compliance (with one-click access to the National PDB), Vue Compensation, and Vue CRM for Insurance Distributors. Vue Distributor Accelerator Suite is preconfigured for Life, Health, and P&C product types to meet each distributors specific requirements. Each segment's distribution model is out- of- the-box and represented by specific workflows, business rules, and reports. This comprehensive suite is easy-to-use, and automates the entire distribution process with state-of-the-art technology that enables straight-through processing and easy to manage workflows. All modules are independent, which enables phased deployment or implementation of a specific module.

Strengthen the link with your agents; enhance your value chain

Streamline all facets of distribution into a single, scalable platform, delivering speed, improved information management, and above all, the ability to strategically focus on revenue and enriched relationships throughout the sales channel. Vue CRM for Insurance Distributors delivers robust agency relationship- management features, lead and opportunity management, territory-performance management, custom sales workflows, service tracking, and analytics. It is designed to deliver top-line growth through its flexible architecture and unmatched configurability.

Digital contracting & onboarding

This complete solution provides a platform for distributors to grow their distribution channel with a modern contracting and onboarding application that's easy-to-use, saves money, and reduces processing time. With self-service portals, producers can easily manage their producer-carrier agreements, E&O requirements, credentials, training, and administrative requests. Straight-through processing and synchronization with the NIPR means always being in compliance.

Design producer compensation plans that are easy to manage

Create flexible commission and incentive compensation plans that meet your objectives. Vue supports traditional commission plans as well as variable compensation, multiple hierarchies, contingent commissions, and other bonus programs. Because all insurers are different, users/administrators are able to set up specific plans, compensation levels, and rules. With a self-service portal, producers can easily review commission statements, gamification, and peer-group performance.

Revenue reconciliation: recover earned revenue

Revenue reconciliation identifies discrepancies in commission payments made by carriers, allowing you to recover rightful income. It forecasts cash inflow based on various parameters and compares side-by-side expected commissions rather than the amount received from carriers, ensuring total accuracy and smooth transactions.

Vue Contracting & Compliance*

Producer contracting

- Electronic submission of data
 - Collect relevant business information
 - Obtain disclosures
 - Pull and verify license information automatically
 - Upload supporting documentation
- Automated checklist for requirements
- Finalize multiple producer/carrier contracts
 - E-signature support
- Contracting data repository to support subsequent additional contracting
- Track producer training certifications and other carrier requirements

Producer Licensing

- Online Universal Application Resident license (RL)
- Non-resident license (NRL)
- RL/NRL renewal process (individual and bulk)
- Fee tracking

Producer compliance

Appointment requests and tracking:

- One-click license synchronization to the PDB with Vue PDB Recon
- Multiple methods of appointments requests including email, file, submission of paper forms
- Appointment tracking status from request to carrier confirmation
- NIPR confirmation and reconciliation of appointments

Eligibility:

- Complete checklist to approve producer activation
- Ready to sell tracking
- Separate rules for selling and paying commissions
- Eligibility web service for administration systems
- Eligibility reporting

Technology

Vue's distribution platform features a collection of modern business modules engineered with the latest technologies to offer a low total cost of ownership while delivering maximum business value, built on a robust framework including MVC, SOA, WCF, and Windows Workflow Foundation. A platform layer enables configuration of custom objects, workflows, documents, and other distribution-specific functions. We harness the power of the latest technology to deliver speed and function. Vue's n-tier SOA-based logical architecture allows encapsulation, separation of business logic, ease of maintenance, enterprise-grade scalability, and increased flexibility. Vue is cloud-based and mobile-ready, offering 24/7/365 easy access with a single sign on, integrated with an active and secure directory. Vue has integrations for Salesforce, Pardot, Marketo, PeopleSoft, AHIP, LOMA, CE Bank, GIS, NIPR, PDB, and many other insurance applications.

Vue Contracting & Compliance*

Supports all insurance compensation plans

- Supports all insurance industry flat rate and percentage commission structures
- Supports graduated and tiered commission plans
- Supports monetary and non-monetary incentives
- Allows strict rules and oversight of compensation advances (annualization)

Revenue Reconciliation

- Create revenue receivables
- Recognize revenue as earned or unearned based on the occurrence of certain events
- Reconcile receivables against revenue and identify and fix mismatches
- Make adjustments or create write-offs against receivables and reconcile mismatches
- Choose a different commission, advance, and bonus template to retroactively recalculate and reconcile

Powerful event driven

compensation calculation engine

- Advanced hierarchy functions (see below)
- Supports custom sales measures
- Supports user-defined commissionable events, e.g., charge backs, renewals, etc.
- Multiple events from on payment
- Supports multiple hierarchies per payee
- Automated scheduler for compensation plans and payouts
- Allows statement previews
- Provides the ability to retroactively make changes to a plan, producer, or policy characteristics along with effective dates

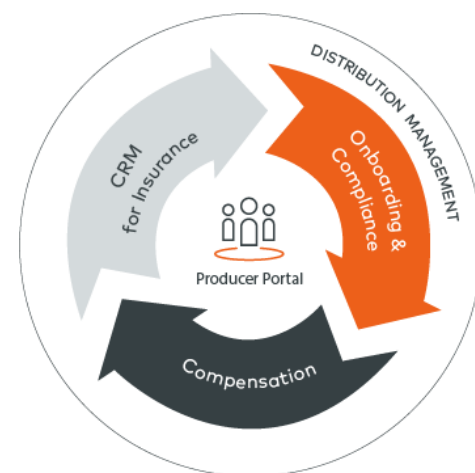
Custom compensation workflows

- Flexible user-defined bonus and compensation programs
- Custom limits and approvals
- Custom bonus approval processes
- Business rules for payouts based on business requirements

Vue CRM for insurance distributors*

2 plans: contact & performance management

- Contact management
- Work management
- Producer portal
- Recruiting
- Sales opportunity management
- Performance reporting
- Territory performance management
- Custom sales workflows
- Vue Analytics



* For a complete list of features by module, please see the specific product

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