

Vue Distribution Management Suite

This new technology is leading the way to modernize distribution, and drive growth for Life & Annuity, P&C, and Health insurers. Vue Distribution Management Suite is the most flexible, scalable, and configurable solution available that seamlessly integrates electronic onboarding, recruiting, compensation management, compliance, easy-to-use self-service portals, and integrated analytical tools into a single platform.

Vue Onboarding & Compliance, Vue Distribution Compensation, and Vue CRM for Insurance modules are tightly integrated in the Vue Distribution Management Platform.



"Using Vue's system, Gerber Life was able to expand its relationships with a number of key business partners, helping everyone grow their business."



Built for insurers, specifically for insurance

Vue Distribution Management Suite provides the tools to modernize your distribution channel. This includes modules for Vue Onboarding & Compliance (with one-click access to the National PDB), Vue Distribution Compensation, and Vue CRM for Insurance with analytical reporting. Vue's producer self-service portal seamlessly integrates with all Vue modules. Vue Distribution Management Suite is preconfigured for Life, Health, and P&C to meet each insurer's 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 distributors; enhance your value chain

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

Revolutionize digital recruiting & onboarding

Vue Distribution Management Suite provides a platform for insurers to grow their distribution channel with a modernized recruitment and onboarding application that's easy to use and saves money with just-in-time appointments, reducing processing time. Vue's straight-through processing and synchronization with the NIPR means always being in compliance. All modules offer robust self-service portal where producers can easily access and manage their producer carrier agreements, E&O requirements, credentials, view commission statements, training, and administrative requests. Integrate Vue directly with underwriting, policy admin, billing and other agent and customer facing applications.

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, utilize innovative gamification techniques, and compare their results to peer-group performance.



"I'm contacted regularly by carriers who are considering purchasing a new CRM solution. When we talk about the problem they're trying to solve, it's usually around managing agents more effectively. Traditional CRM solutions simply don't have all the functionality needed to do this well. My recommendation is to look at a Distribution Management System combined with CRM."

CELENT

Vue Onboarding & Compliance*

Producer Licensing

- One-click synchronization to the NIPR and PDB with Vue PDB Recon
- Online Universal Application Resident license(RL)
- Non-resident license (NRL)
- RL/NRL renewal process (individual and bulk)
- Fee tracking

Producer Contracting

- Electronic submission of data
- Collect relevant business information
- Obtain disclosures
- Automated background checks
- Pull and verify license information automatically
- Track product training certifications
- Upload supporting documentation
- Automated checklist for requirements
- Finalize producer contracts
- E-signature support

Producer Compliance

Appointing:

- Automated background checks
- Straight-thru appointment processing
- Workflow appointment requirement verification and escalation processes
- Just-in-Time (JIT) appointments
- Configurable automatic notifications
- State rules updated weekly

Compliance Processes:

- Processes for license renewal, reconciliation of appointments, and termination of low producing agency appointments
- Terminate appointments before renewals are billed
- Automatic alerts

Eligibility:

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

Vue Distribution Compensation*

Supports All Insurance Compensation Plans

- Supports multiple insurance compensation plans such as flat commissions, transactional 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)

Powerful Event Driven Compensation Calculation Engine

- Enable custom sales incentive compensation plans including contingent commissions, profit share and gamification
- Supports user-defined commissionable events, e.g., charge backs, renewals, etc.
- Supports multiple hierarchies per payee
- Provides the ability to retroactively make changes to a plan, producer, or policy characteristics along with effective dates

Insurance Product-Line Support

- Manages multiple types of insurance contracts/policies
- Serves unlimited hierarchy tiers
- Provides efficient policy and insurance-plan research

Custom Compensation Workflows

- Customizes approval processes
- Provides business rules for payouts based on business requirements

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.

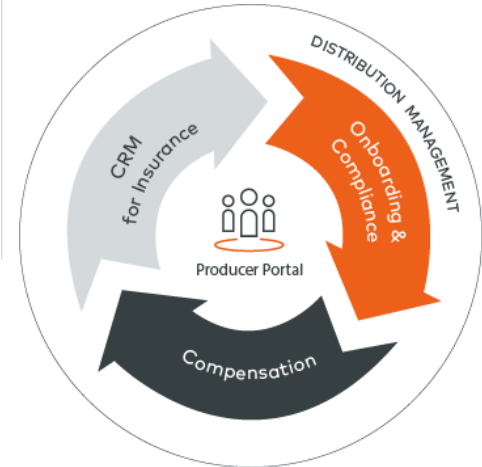
Vue's n-tier SOA-based logical architecture allows encapsulation, separation of business logic, ease of maintenance, enterprise-grade scalability and increased flexibility. Vue is cloud-based and mobile-ready, offering 24/7/365 easy access with a single sign on, integrated with an active and secure directory.

Vue has integrations for Salesforce, Pardot, Marketo, PeopleSoft, AHIP, LOMA, CE Bank, GIS, NIPR, PDB, and many other insurance applications.

Vue CRM for Insurance*

3 plans: contact, opportunity & performance management

- Contact 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 data sheet.