

# Sircon Onboarding & Self-Service

## Onboarding is an agent's first impression of you. Make it a good one.

Build a stronger relationship with your distribution channel partners by simplifying the way you work together and connecting to share information. Accelerate the onboarding and contracting process with automated solutions that get agents set up and selling faster.

### Features you need

**Automated onboarding process.** Pre-populates producer data for a streamlined digital interview process only collecting omitted information, automatically obtains missing appointments, and notifies producers so they are set up to sell within minutes.

**E-signature with DocuSign.** Secure embedded digital signatures collected via DocuSign, all as part of your Vertafore subscription.

**Self-service agent accounts.** Via their own Sircon account, producers can participate in onboarding interviews, submit self-service requests, and monitor status updates, further reducing the need for human intervention by your team.

**Seamless integration.** Initiate producer requests automatically from your CRM, HR, and other internal systems.

**Robust process controls.** Establish business rules and conditions that conform to your specific appointment processing needs based on product, region, or channel so everyone involved knows who is authorized to sell what products.

**Just-in-time (JIT) appointing.** Optimize appointment expenses to align the spend associated with them to actual business and utilize a termination for lack of production process (TLOP) to review agent appointments where no new business has been received.

### Some customers have seen potential for

- **50% less time** spent on the recruiting and onboarding process, thus reducing onboarding backlogs.
- **Save 15 minutes** per appointment request per producer of carrier processing time.
- **40% reduction** in new producer time to productivity.
- **0.5% improvement** in revenue from improved competitiveness and quicker recruit-to-hire.
- **25% cost reduction** in state appointment fees due to cost-saving compliance strategies, including JIT appointments.

"We've been able to get some of the agents through the system in 24 hours. What that means is that the agent is on the street selling business right away. We don't have that delay where the agent can't sell because he's not appointed with the company. They can focus on selling and they're not losing interest in our company."

**Donna Robinson,**  
AVP, Licensing & Commissions,  
Physicians Mutual Insurance Company

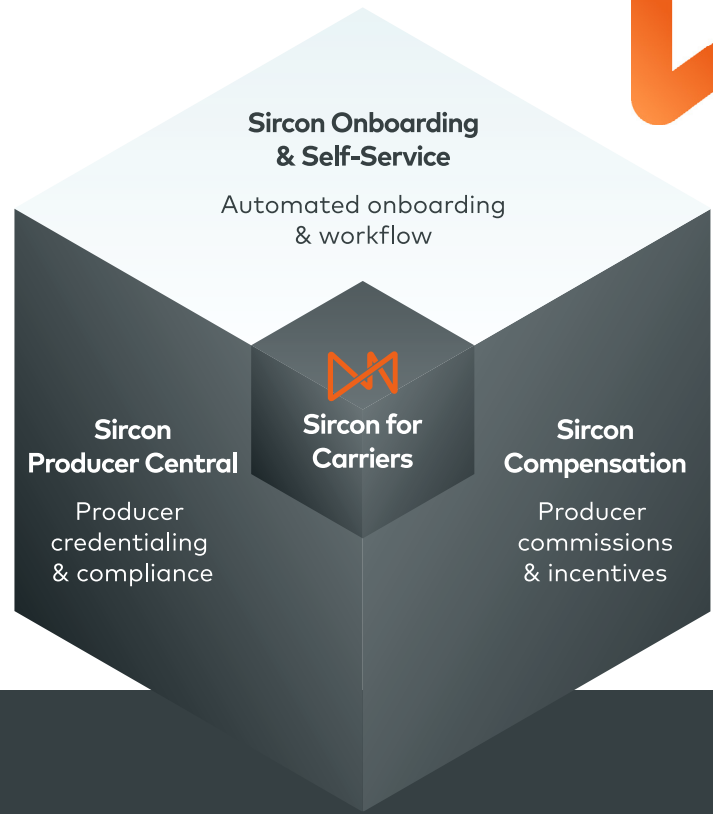
Visit for more info

or call 800.444.4813

# Sircon for Carriers

## Comprehensive distribution management

The Sircon for Carriers portfolio is an end-to-end solution providing a comprehensive distribution management system. These three products complement each other to provide streamlined onboarding, agent self-service, fast and accurate compensation, and a 360° view of your agents. Sircon for Carriers delivers revenue growth, operational efficiency, staff effectiveness, and reduced compliance risk.



## Sircon by the numbers

**640+** carrier

groups, covering

**3,000 companies**

manage their distribution channels with Sircon solutions.

**50%** of all industry compliance licensing transactions go through Sircon.

Every year

**2.2 million** license applications & renewals are processed through Sircon.

**40+ million**

compensation transactions nightly.

**20 state** regulators utilize Sircon software as their system of record.

**94** of the top 100 carriers leverage Sircon solutions.

License transactions processed through Sircon in all

**50 states.**

**12.9 million** producer appointments and terminations annually.

**39,000+** agencies across all jurisdictions.

Network of

**1.4 million**

agents and advisors.

**2,500+** continuing education providers in the Sircon network.

**45%** of all licensees are in states that use Sircon as their system of record.