

STREAMLINED WORKFLOW, SMARTER EXECUTION



QUOTES &
ILLUSTRATIONS



FILED UNDERWRITING



E-APPLICATION



AGENCY
MANAGEMENT

- CASE MANAGEMENT
- COMMISSIONS
- CARRIER DATA FEEDS



E-DELIVERY



DATA ANALYTICS
& AI

AgencyIntegrator™ provides a centralized database of agent contacts and application data for BGAs, marketing organizations, financial institutions, and banks. This centralized database helps case managers streamline workflows for case management and commission reconciliation and better manage their overall day-to-day insurance operations.

With AgencyIntegrator, you can easily manage and expedite key cases and spend less time manually tracking and reporting.

This solution easily integrates with carrier data, vendor requirement fulfillment, third-party industry tools, and solutions from iPipeline, including iGO®, DocFast®, DataView, and our CRM offering.

FEATURES



Manage cases holistically, from pre-app to in-force



Track agent details, demographics, and licensing and appointment information



Auto-populate requirements for carriers based on underwriting guidelines



Maintain complete case histories, create memos, conduct follow-ups, and send automated email reminders



Receive carrier pending case information directly from carrier feeds



Track different types of commission payments



Connect to third-party paramed APS and imaging vendors



Report on agency business with out-of-the-box and ad-hoc reports

BENEFITS



Make smarter executive decisions with data and insights from robust reporting



Reduce IT overhead costs



Manage information in one unified system



Increase customer satisfaction with better tools, portals, and reporting



Decrease case cycle time



Improve financial oversight of commission revenue



Experience an intuitive case management system



View case status and provide optional direct case access and insights to agents with DataView, an online portal for BGAs



SCHEDULE A DEMO

www.ipipeline.com | 800.758.0824

