

# STREAMLINED WORKFLOW, SMARTER EXECUTION

## AgencyIntegrator™

AgencyIntegrator provides a centralized database of agent contacts and application data for BGAs, marketing organizations, financial institutions, and banks. This centralized database helps your case manager 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.

## How Can AgencyIntegrator Help You?

### A ROBUST ECOSYSTEM TO IMPROVE CUSTOMER EXPERIENCE

You need to be able to service customers and manage your respective cases, but if you have an outdated agency management system with little to no integration capabilities with customer relationship solutions or third-party applications, you most likely find yourself fighting an uphill battle.

Outdated AMS solutions result in too much time spent managing back-office tasks and not enough time spent on revenue-generating activities. By automating common agency tasks, you can easily streamline day-to-day operations, giving your team more time to focus on what's important to grow your business: customer service, cross-selling, and helping customers more effectively reduce their risk.

But it can be difficult to accomplish this goal because...

**“Agencies struggled with managing back-office workloads, which led to a drop in customer satisfaction and financial performance.”\***

AgencyIntegrator simplifies the process by automatically receiving case information from carrier feeds and populating information in the system. Pending cases, in-force cases, commissions, and appointment feeds can also be accepted by many carriers.



*\*Sourced from: Four Ways Independent Insurance Agencies Can Tech Up (forbes.com)*



## EXTENSIVE CARRIER PRODUCT CONTENT LIBRARY

AgencyIntegrator contains one of the largest life insurance and annuities forms library in the industry-leveraging insurance carriers' product information, forms, and application requirements within the system. Forms are easily selected from the product library to be sent as an attachment to your client, without you ever having to leave the system.

AgencyIntegrator offers a few additional modules that help case managers and admin staff perform their daily tasks more efficiently.

## FLEXIBLE COMMISSION MODULE

AgencyIntegrator's commission module accepts many different types of commission payment tracking. This module can also set up schedules and reconcile commissions for any level in the hierarchy, from the writing agent, up to the BGA, including upline bonus management. The commission module performs the following functions:

- Enables a reconciliation of actual commissions received against estimates to ensure carriers pay your agency the correct amount:
  - Identifies any incorrect payments made by the carrier
  - Identifies situations in which the carrier may owe commissions but has not yet been paid
- Eliminates the need to manually enter data and carrier commission statements into your system thanks to automated carrier feeds or an Excel import
- Calculates payments that need to be made to agents and hierarchies while easily generating commission statements for payments
- Generates comprehensive reports such as agent-specific commission statements and commission reconciliation reports for BGAs, agents, and all commission recipients
- Easily exports commission data to third-party accounting software

## KEEP YOUR AGENTS UP TO DATE WITH DATAVIEW

Agents can view current case status information through DataView, an online case status portal. This information is directly updated by AgencyIntegrator to help agents stay up to date on their cases without the need to call their case managers. The following features help agents seamlessly track and monitor their case status:

- An alert will appear in the DataView dashboard when a case manager sends a comment regarding a case through AgencyIntegrator
- Agents can then respond in DataView, and the comments will appear in the associated case manager's "Command Center" in AgencyIntegrator
- Comments are tracked in both DataView and AgencyIntegrator
- Agents can directly access iGO®, iPipeline's e-app solution, from DataView to auto-populate and approve cases in iGO



## OUT-OF-THE-BOX INTEGRATIONS

To help your agents drive efficient growth and increase productivity, AgencyIntegrator easily integrates with many vendors, as well as other iPipeline solutions.

AgencyIntegrator integrates with iGO, iPipeline's e-Application solution to:

- Reduce data entry time by auto creating and approving cases in iGO
- Generate a copy of the completed application from the AgencyIntegrator Vault

AgencyIntegrator offers key integrations such as:

- Ordering paramed exams or APSs from the case in AgencyIntegrator without re-keying client information through APS and exam vendors
- Accessing image documents with a single click through imaging vendors
- Eliminating duplicate data entry within AgencyIntegrator through appointment and license management companies
- Enabling native secure email functionality

Consider adding iGO (e-Application), DocFast® (e-Delivery), InsureSight® (Case Analytics), and our CRM offering to your AgencyIntegrator – for maximum value.



Estimated **48%\***  
Market Users use  
AgencyIntegrator



**57%\*** of existing  
customers have been  
using AgencyIntegrator  
for **15 years**



Over **18 million\***  
applications  
run-through  
AgencyIntegrator



**18\*** third-party  
solution provider  
integrations  
available



**364 Distributors\***  
using  
AgencyIntegrator

*\*These numbers are subject to unpredictable and ever-changing outcomes over time.*



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