Sircon Onboarding & Self-Service

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

Build stronger relationships 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 quickly get agents set up and selling—so you both see results sooner.

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.

Agency-initiated onboarding. Decide which agencies can initiate and manage producer onboarding in real-time.

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.

"This was a game-changer for us...it was a timeconsuming process to contract new associates and brokers with the large amount of paperwork we encounter...it's amazing to see the process happen in about five minutes."

Large Northeast U.S. Health Provide

Visit for more info →

or call 800.444.4813

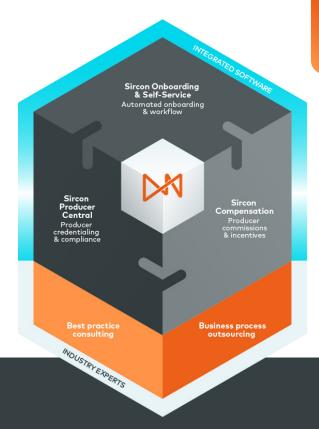




Sircon for Carriers

Strategic Distribution Management

Sircon for Carriers enables carriers to strategically leverage distribution management with comprehensive solutions and support. Anchored by our integrated distribution management technology, the solution is complemented by industry experts who serve as your strategic partners and can provide additional best-practice consulting and outsourcing services as needed.



Sircon by the numbers

650+ carrier

groups, covering

3,000 companies

manage their distribution channels with Sircon solutions.

168+ million

compensation transactions monthly.

License transactions processed through Sircon in all **50 states.**

Network of

1.8+ million
agents and advisors.

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

18 state regulators utilize Sircon software as their system of record.

10+ million producer appointments and terminations annually.

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

Every year nearly

2 million license applications & renewals are processed through Sircon.

96 of the top 100 carriers leverage Sircon solutions.

68,000+ agencies across all jurisdictions.

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

© 2025 Vertafore, Inc. and its subsidiaries. All rights reserved. Trademarks contained herein are owned by Vertafore, Inc. This document is for informational purposes only. Vertafore makes no warranties, express or implied, with respect to the information provided here. Information and views expressed in this document may change without notice. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

