

# 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 time-consuming 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 Provider**

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.

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

Every year nearly

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

**168+ million**

compensation transactions monthly.

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

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

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

**10+ million** producer appointments and terminations annually.

**68,000+ agencies** across all jurisdictions.

Network of  
**1.8+ 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.