

AgentSync Contracting: A Simplified Way to Assign and Manage All Carrier Contracts

Provide your producers with a white-glove contracting experience

Without the right solution, producer to carrier onboarding is a tedious, manual process. Administrators lose clarity by storing and tracking contract progress across countless email threads or disparate spreadsheets, and producers grow tired of manually entering the same information into lengthy contracts over and over again. These inefficiencies only compound as an agency continues to scale their carrier partnerships. If unaddressed, a poor contracting workflow can cause significant delays in producer onboarding which can lead to disruption in an agency's sales processes.

AgentSync Contracting streamlines producer onboarding by providing full visibility into contract status. Agency Administrators and producers can manage everything in a centralized workflow, reducing time-consuming back-and-forths and accelerating IGO-ready contract submissions to carriers. Built-in automations eliminate friction, remove repetitive data entry, and get producers selling faster.

KEY FEATURES OF AGENTSYNC CONTRACTING



CENTRALIZED CONTRACT MANAGEMENT

Assign and manage all contracts and necessary actions from one central location.



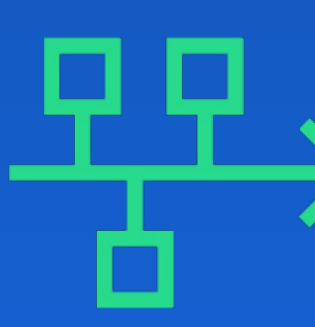
STREAMLINED PRODUCER ONBOARDING

Rather than manually entering the same information into multiple contracts, a producer fills in their data once and Contracting auto-populates it across all other contracts.



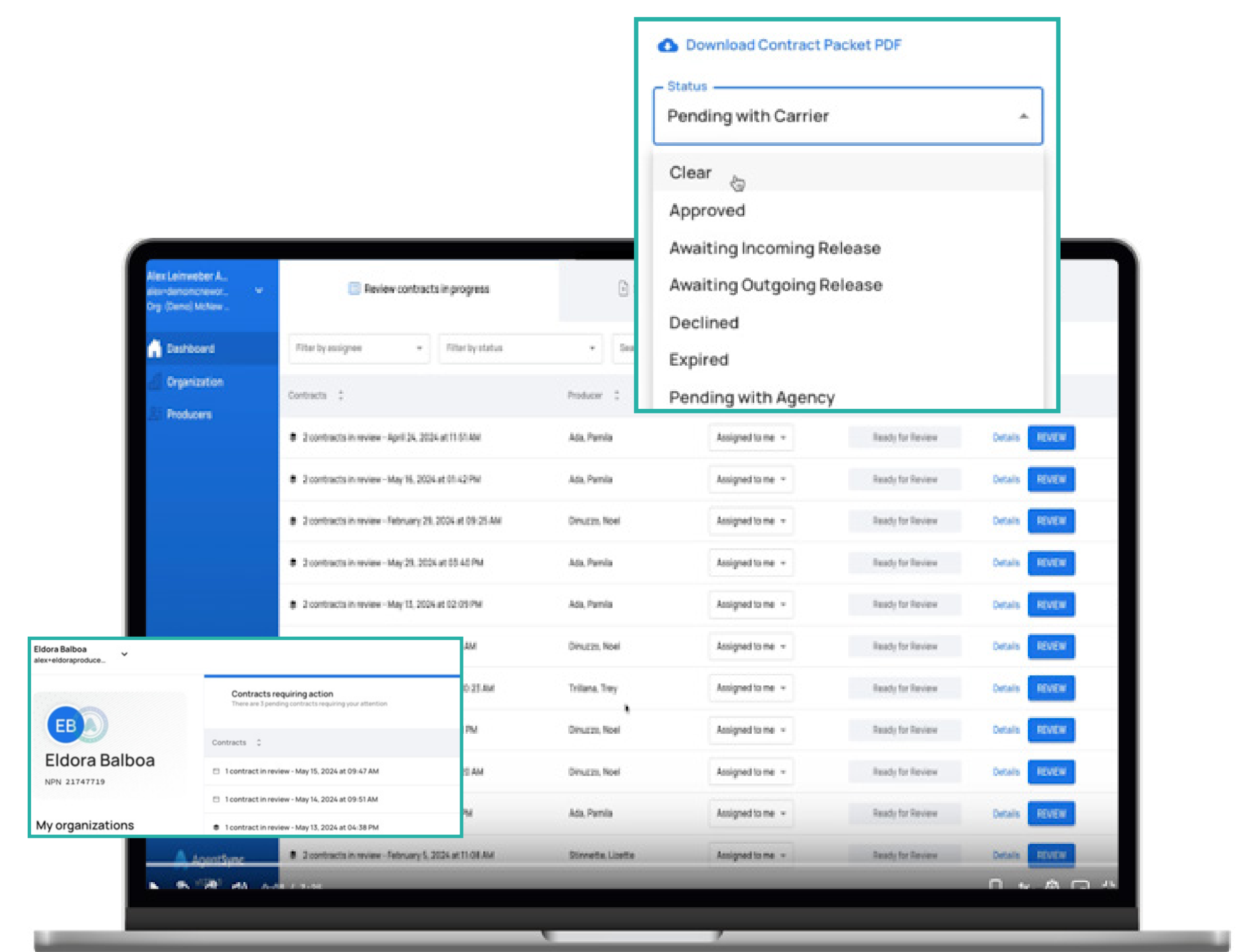
MULTI-CONTRACT PROCESSING

With multi-contract support, administrators can easily advance producers with multiple contracts through the contracting process in a single click.



CONNECTED WORKFLOWS

Producers and administrators can reduce the time to submission by editing and sending contracts for review in the same workflow.



Reduce complexity with AgentSync Contracting

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