

AgentSync Learn: CE data where you need it, when you need it

With integrated continuing education, powered by WebCE, and strategic automation you can put chasing deadline worries behind you.

AgentSync Learn

From lost license renewal fees to stalling or losing business while the producer pauses to get compliant, taking a manual approach to producer CE can cost you.

With AgentSync Learn, you can ensure every renewal is CE-compliant. No more flushed renewal fees, no more rejected applications, and no more switching back and forth between tabs so your team can manually duplicate transcript details from multiple other locations.

By integrating with AgentSync Learn, powered by WebCE, you get a data layer that incorporates resident state CE requirements into your existing Manage Workflow. This data then triggers automated emails that alert your producers well in advance of their CE deadlines. Give your admins an at-a-glance view into which producers can renew according to their resident state's particular timeline and CE requirements.

✓ CE verification

Greenlight producers' ready-to-renew status before submitting costly state license renewals.

✓ Large-scale reporting

Sort producers by CE due date and check follow-ups to get producers back on track before lapses happen.

✓ Hour completion rate

View the aggregate hours a producer has completed in a comparison view to their resident state licensing requirement.

✓ Email log

Maintain an easy-to-access record of manual and automated emails by date to preserve your audit trail.



AUTOMATED REMINDERS

Remind producers with missing CE to help them meet their deadlines.



CE WARNING

Flag producer license renewals that could fail *before* you submit.



DUE DATE ACCURACY

Understand state-specific CE timelines, even in perpetual-license states.

