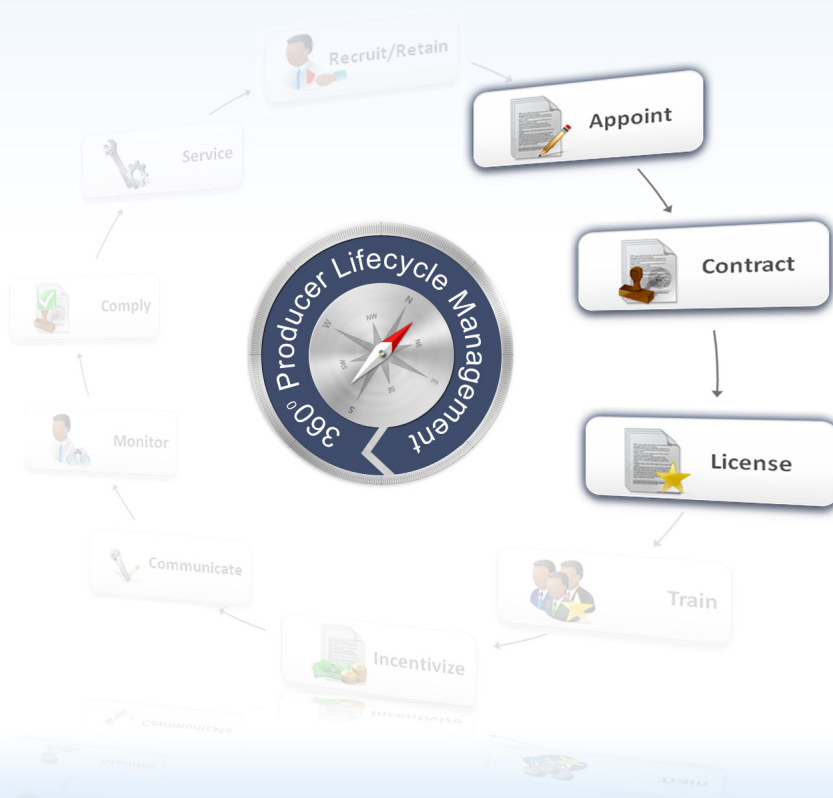


VUE Producer Onboarding is a flexible Web-based solution that speeds the onboarding process while ensuring compliance and reducing transaction costs.

360° Producer Lifecycle Management

Use VUE Producer Onboarding as part of a complete insurance distribution-management system to attract and quickly onboard the best producers. VUE Producer Onboarding delivers the tools and integration points for the appointment, contracting and licensing phases of the full lifecycle of producer management.



Accelerate Producer Onboarding

Speed and streamline onboarding with online onboarding that makes a great first impression and simplifies the process for prospective producers. Pre-filled and contextual forms reduce input redundancies and capture only what is needed from producers to enhance the onboarding experience.

Realize Just-in-Time Appointments

Event-driven workflows delay finalization of the appointment process until a new producer has written business. By avoiding the payment of appointment fees for non-producing agents, carriers eliminate unnecessary costs and increase the value onboarding brings to the organization.

Reduce Transaction Costs

Because there are no third-party fees for National Insurance Producer Registry (NIPR) and Producer Database (PDB) checks, VUE Producer Onboarding dramatically reduces the transaction costs for qualifying and appointing new producers.

Eliminate Manual Processes

Improve data quality and reduce the time producers spend resolving issues with fully-automated processes and verification. Multi-point credential authentication and background checks ensure accuracy and trouble-free onboarding.

About VUE Producer Onboarding

VUE Producer Onboarding Features:

Onboarding Automation:

- Capture demographic information
- Collect business background data
- Obtain disclosures
- Run background checks
- Collect and verify license information
- Track certifications
- Authorize product selling
- Make appointments
- Collect fees
- Secure supporting documentation
- Finalize producer contracts

Capable Home Office Tools:

- Set up hierarchies
- Establish compensation schedules
- Obtain assignments
- Assign beneficiaries
- Collect payment details
- Record tax documents

Robust Workflow:

- Standard NIPR and PDB integration
- Background-check vendor integration
- Task creation and routing
- Graphical workflow and questionnaire designer
- Form branching
- Letter and email generation
- E-signature support
- Document management

Value

VUE Producer Onboarding helps deliver a rapid return on investment (ROI):

- Agile producer onboarding – Reduce onboarding time from weeks to hours.
- Funnel visibility – Deliver insight into the producer onboarding process.
- Just-in-time appointments – Only appoint producers who are actually selling.
- No third-party transaction fees – Eliminate all middleman NIPR and PDB fees.
- Increased selling time – Free sales resources from managing issues so there is more time to drive sales.
- Error reduction – Enforce compliance and sharply reduce errors with systematic workflows that eliminate manual data-entry.
- Lower cost of ownership – Eliminate expensive coding and empower business users to make changes to workflows and business rules themselves.

Technology

VUE Software utilizes Microsoft® platform technologies as the foundation for all system development, providing a standard architecture to facilitate enterprise integration and ensure cost effective implementations.

VUE Software is an active member in Microsoft's Insurance Value Chain (IVC) program, working closely with Microsoft to ensure leading system integration, scalability, reliability and security.

About VUE Software®

VUE Software, the product division of Computer Solutions and Software International (CSSI), is a leading provider of Distribution, Incentive Compensation and Sales Performance suites. Our solutions are built to meet the unique needs of the life, health, property and casualty and managing general agent verticals and backed by over twenty years of insurance experience.



Scan For a Digital Copy

For More Information

For more information on VUE Software or to arrange a demo, visit www.vuesoftware.com, email us at info@vuesoftware.com, or call the VUE Software Sales Information Center at 1-877-488-3763.