Sircon® Managed Services

Data Sheet

Professional services as diverse as your ever-changing needs.

There's nothing wrong with asking for a hand when you need one. Mergers and acquisitions, business process changes, and regulatory changes often require insurance companies to accommodate big business changes in a short time. Vertafore will be right by your side through times of rapid growth and changing technologies—pushing your overall business to become more efficient. Or maybe you have an idea about how you'd like to use your existing services to meet a new business need. Whichever the case is, Sircon Managed Services can provide you with convenient and timely help—how you need it and when you need it.

Make the Most of Your Investment

Sircon Managed Services are designed to enhance your existing producer lifecycle management solution and help you make the most of your investment. Managed services can help with additional integration, changes to your configuration, and changes that result from regulatory, legal, or business changes. Our out-of-the-box services include:

- Data reconciliation
- Reporting services
- Business process change services
- Integration services
- Supplemental training

Data Reconciliation Services

If your company has a sudden or urgent need to update or incorporate large quantities of producer data—or just needs help reconciling data to maintain compliance, our data reconciliation services can help. We use our sophisticated data synchronization technology to reconcile your data with data on file with the National Producer Database (PDB) to help you:

Manage appointment renewals—The appointment reconciliation processing (ARP) service efficiently reconciles your company's list of producers with the state's list so you can terminate producers for lack of production rather than paying for unnecessary renewal fees.

Reconcile producer data—Our producer data reconciliation (PDR) service compares all licensing, appointment, and demographic information on your producers with the information on the PDB, enabling you to reduce exposure to fines and penalties for non-compliance.

Execute mass appointments and appointment terminations—Events like mergers and acquisitions, or changes in distribution channels or carriers, mean processing large numbers of appointments and terminations. To save money on renewal fees, you may terminate large numbers of producers for lack of production.

What is producer lifecycle management?

Producer lifecycle management refers to managing all the activities required to keep agents and CSRs compliant with regulatory requirements throughout the course of their selling or servicing careers. Some of these activities include onboarding, licensing, appointing, continuing education, and termination.

As the industry leader in producer lifecycle management technologies, Vertafore provides an online service that connects stakeholders to automate the activities required to keep producers authorized to sell.

Benefits:

- **Improved turnaround**—Quick, flexible, and available when you need them, Vertafore managed services are like an extension of your team.
- **Flexible purchase options**—Each opportunity in your business may call for different levels of service. You can use Vertafore managed services via several different purchase options that are customized to suit your business needs.
- **Easy administration**—Streamlined paperwork and simple contracts help speed project approvals.

Eliminate the need to manually enter updated data from Vertafore systems into your system of record—Our data reconciliation services include data export capabilities that allow you to easily access producer and agency information on file with the states and feed it to downstream systems automatically.

Report Services

Knowledge is power. Our reporting services enable you to drill down to the unique dataset you need to make business decisions and fulfill tax requirements. We can segment important data on a customizable basis and automate routine reporting.

Custom reports—Whether you are seeking to reduce costs or expanding into new product lines, Vertafore can help you gain fresh insights through customized, highly segmented reports.

Automated reporting capabilities—If you access the same reports time and time again, our automated reporting can take care of the many associated manual processes for you.

Year-end tax summary reports—Concerned about all the digging you need to do to find the information you need to file taxes? We offer a service that can do it for you.

Business Process Change Services

Have you ever wondered if you could change your service to handle a new business need? Our business process change services empower you to do just that. This service gives you the flexibility to make changes to your configuration when changes in your workflow or forms arise. Our business process change services enable you to:

Automatically correct data
Armed with data correction capabilities, you can automatically correct large amounts of producer data without the headache associated with changing thousands of records manually.

Easily add new information packets to your workflow
Processes change, that's why we made packet amendments and additions easy.

Add, remove, or amend the forms associated with producer on-boarding and credentialing
We make quick work of changing forms to conform to amendments made to your contracts or other legal documents.

Adjust for workflow changes
We can help you configure your system to adjust for any changes in your processes to support new company policies, procedures, regulations, and new lines of business.

Quickly update new background investigation vendor info
Vendors often change from one supported type to another. Let us help you make necessary changes quickly so agent on-boarding is not interrupted.

Accommodate Just-In-Time (JIT) appointing
A number of our clients appoint agents on a JIT or as-needed basis to avoid paying for unnecessary appointment fees. Our business process change services give you the flexibility to configure your system to support JIT appointing.

Solution 'Tune-Up'
Evaluate and analyze your current usage of the Sircon platform. This service will offer both client and Sircon the opportunity to further explore your business needs in the effort to better streamline business processes.

Training Services

Vertafore's trainers deliver personalized instruction on your unique system configuration to new staff members, or introduce existing staff to new capabilities. Customized supplemental training can also help you learn how to do more with your existing service. We offer a variety of customizable training options, on site or remotely, presented in a multitude of formats. You can also arm your users with documentation that mirrors your custom configured application.

Integration Services

Our integration services offer you support in a user acceptance testing (UAT) environment, enabling you to make changes to your processes or test other scenarios in your existing environment without consequences. For example, IT system changes can mean modifications to your data feeds. Vertafore also offers a wide variety of remote and on-site assistance to either improve or expand your current system integration solution-set; including sample code, APT kits, customized web service coding support, and development support.

Getting Started

We offer flexible options for using our managed service offerings. Depending on the type of service, options include:

- Time and materials
- Fixed project fees
- Retainer

For more information about Managed Services, please contact us at 877.876.4430 or visit sircon.com.

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