AgentSync Manage For MGAs:
Streamlining distribution channel management and compliance

AgentSync Manage eliminates compliance-related complexity in distribution channel management processes for leading MGAs.

AgentSync Manage

Without the right technology, tracking, understanding, and managing ever-changing state compliance requirements in producer management workflows can be impossible to handle at scale.

Businesses rely on legacy systems that repeatedly fail to consolidate necessary regulatory data to provide complete visibility on distribution partner regulatory status.

Think: multiple system logins, redundant data entry, and inefficient email communications.

With Manage, your team gets the technology they need to easily identify risks and ensure compliance across your entire distribution channel. Whether you're looking to grow your business, reduce operational costs, or a bit of both, Manage is here to help you take your producer management and compliance workflows to the next level.

✓ Exceptional producer experience

Build a frictionless and modern producer experience by getting them licensed, appointed, and ready-to-sell quickly and efficiently.

✓ Real-time, integrated compliance

We bake state-by-state requirements in your workflows and keep an audit trail of your actions to prove each submission is accurate and timely.

✓ Data intelligence

Your single source of truth on your producers, consolidating key compliance data into easy-to-use and actionable reports and dashboards.

✓ Strategic automations

Send reminders to producers when they need to submit background checks, documentation, or complete continuing education.

TAILORED PRODUCER PORTAL

Producers can view their licenses, appointments, update their information, complete background checks, and upload documents.

ELIGIBILITY CHECKS

Built-in eligibility checks ensure you only take action if a producer is accurately and appropriately credentialed, so you can be confident in every action submitted.

UNBEATABLE PRICING

With the automation, efficiencies, and accuracy that our tech brings, Manage is cost-efficient and cost transparent.

UNPARALLELED PARTNERSHIP

Our experts are an extension of your team and will respond in under 24 hours (with an average response time of three hours)