STREAMLINED WORKFLOW, SMARTER EXECUTION

QUOTES & ILLUSTRATIONS

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FILED UNDERWRITING

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E-APPLICATION

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AGENCY MANAGEMENT
- CASE MANAGEMENT
- COMMISSIONS
- CARRIER DATA FEEDS

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E-DELIVERY

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DATA ANALYTICS & AI

Agency Integrator provides a centralized database of agent contacts and application data for BGAs, marketing organizations, financial institutions, and banks. This centralized database helps case managers streamline workflows for case management and commission reconciliation and better manage their overall day-to-day insurance operations.

With Agency Integrator, you can easily manage and expedite key cases and spend less time manually tracking and reporting.

This solution easily integrates with carrier data, vendor requirement fulfillment, third-party industry tools, and solutions from iPipeline, including iGO®, DocFast®, DataView, and our CRM offering.

FEATURES

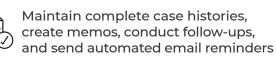- Manage cases holistically, from pre-app to in-force
- Track agent details, demographics, and licensing and appointment information
- Auto-populate requirements for carriers based on underwriting guidelines
- Maintain complete case histories, create memos, conduct follow-ups, and send automated email reminders
- Receive carrier pending case information directly from carrier feeds
- Track different types of commission payments
- Connect to third-party paramed APS and imaging vendors
- Report on agency business with out-of-the-box and ad-hoc reports

BENEFITS

- Make smarter executive decisions with data and insights from robust reporting
- Reduce IT overhead costs
- Manage information in one unified system
- Increase customer satisfaction with better tools, portals, and reporting
- Decrease case cycle time
- Improve financial oversight of commission revenue
- Experience an intuitive case management system
- View case status and provide optional direct case access and insights to agents with DataView, an online portal for BGAs

SCHEDULE A DEMO

www.ipipeline.com | sales@ipipeline.com | 800.758.0824

IPIPELINE®