

Xchange Smart Automation Tools

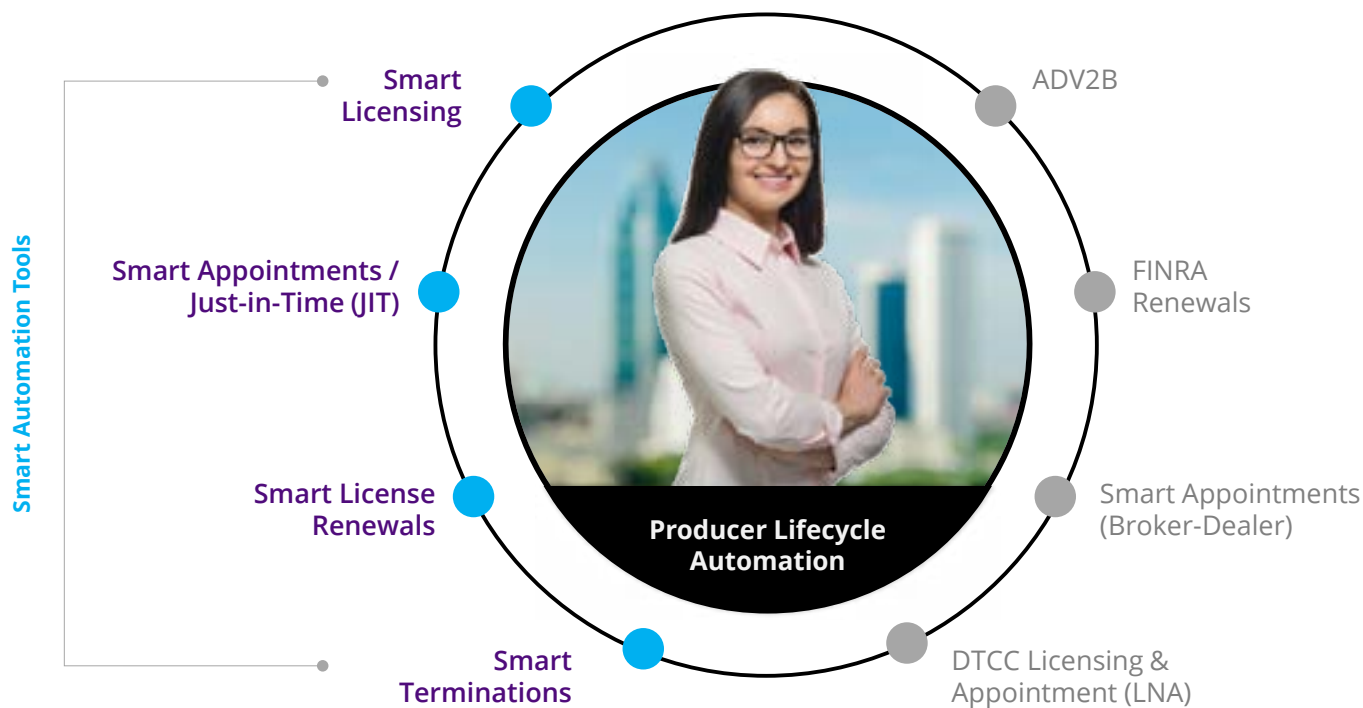
Drive new levels of efficiency with solutions that streamline and automate producer management to speed to market and reduce risk

Xchange Smart Automation ToolsSM

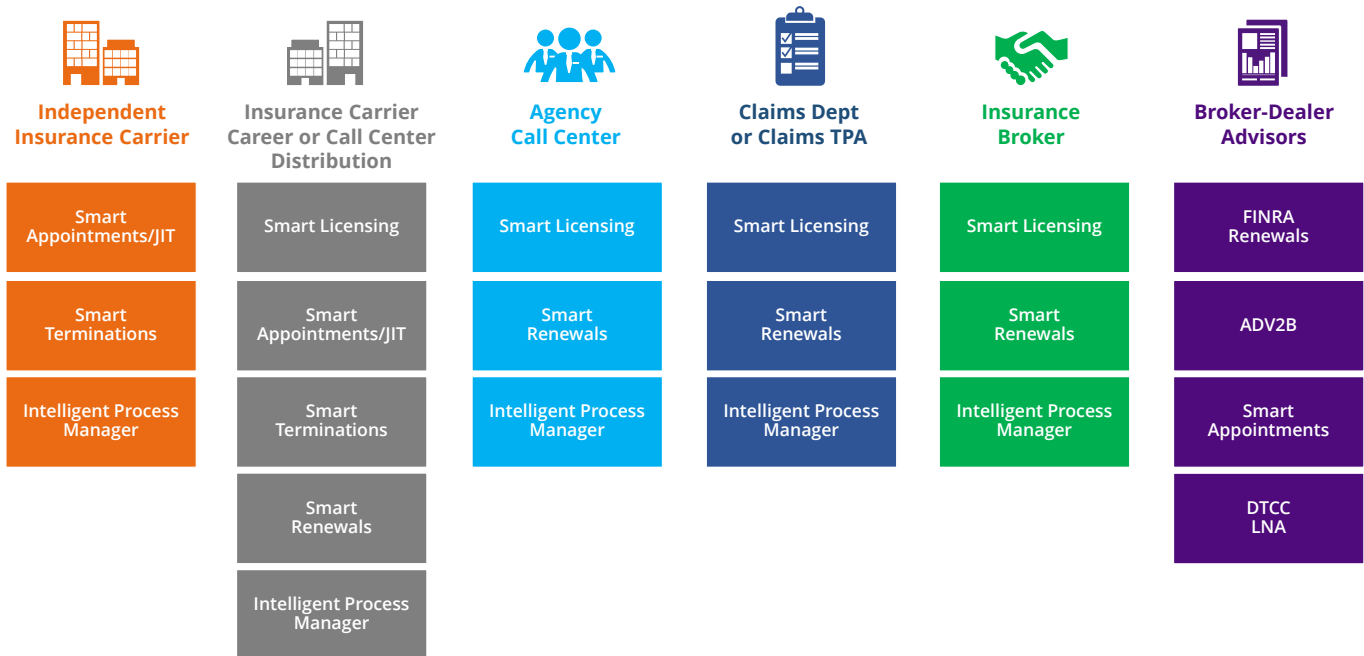
Proven over more than 200 implementations, *Xchange Producer Management* delivers the most advanced automation in the industry, minimizing human intervention, reducing NIGOs and speeding time to market. Straight-through processing, just-in-time appointments and capabilities that are unique to RegEd, such as *Smart Appointments* and *Alerts 2.0* producer data reconciliation, enable efficiency across all operational processes. The solution delivers a seamless user experience and self-service capabilities to ensure the highest level of producer and adjuster satisfaction.

Xchange Smart Automation Tools represent a critical step forward in management by exception for licensing and registration teams, and represent the only end-to-end solution to automate and streamline producer management and compliance processes from onboarding and initial licensing and appointment, to license renewal and terminations. This “closes the loop” on a fully automated producer lifecycle, enhancing operational efficiency while enabling scalability to facilitate M&A, new product acquisition and distribution channels, or ramp up for cyclical changes in demand such as Annual Enrollment Periods (AEP).

End-to-End Producer Lifecycle Automation and Management By Exception



Powerful Capabilities Tailored to Fit Your Business Model



ROI for Licensing Operations



Greater efficiency and management by exception



Faster time to market



Built-in compliance to reduce risk



Scalability to maintain headcount as volume increases



Eliminate NIGOs



Reduced pressure on L&R staff turnaround