


# XCHANGE PRODUCER ONBOARDING

DELIVER A FRICTIONLESS PRODUCER EXPERIENCE ACROSS THE ONBOARDING PROCESS

Powered By  salesforce

*Xchange Producer Onboarding* automates the agency and agent onboarding and credentialing process.

The solution enables insurance companies to dramatically reduce the time to contract and appoint producers, while providing a streamlined user experience and speeding time to market.

## KEY CAPABILITIES



### Dynamically Generated Contracts

Contract appendices are dynamically generated and pre-populated based on producer selections, including LoB and product selections.



### Auto-Populated Producer Data

Automatic data population from primary sources – including NIPR, BI providers and internal CRM and third party systems - to reduce data entry.



### Business Process Automation

Auto-trigger appointment transactions and background investigations based on business rules, eliminating the need for staff intervention.



### “Clear to Sell” Validation

Real-time credentials validation and data synchronization with the NIPR ensure that producers are properly credentialed at the time of business placement.



### Workflow & Hierarchy Management

Auto-route electronic contracting packets through the approval process, ensuring that required sign-offs occur and exceptions are queued for review.



### Self-Service Tools

Self-service capabilities include guided interview questions, simple forms maintenance, real-time appendix creation and easy access to hierarchy views.



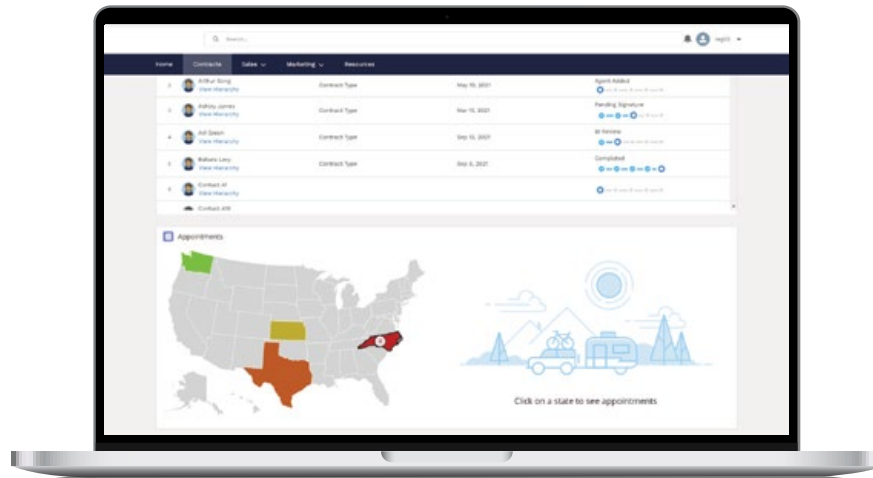
### Status Notifications & Dashboards

Status alerts are sent to designated recipients as contracting progresses. Provide unified views of contracting approval status and exceptions.



### Enterprise Reporting

Generate templated and ad-hoc reports, across the producer population, at any level of the company's hierarchy.



## KEY BENEFITS

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### Producer Satisfaction

Deliver a frictionless user experience and speed to market that earn the loyalty of top producers to achieve sales and revenue goals.



### New Levels of Operational Efficiency

Drive efficiency across the onboarding and credentialing lifecycle and enable staff to manage by exception.



### Faster Time to Market

Data integration and business process automation capabilities minimize the time producers spend on compliance-related tasks.

## ABOUT REGED

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RegEd is the market-leading provider of RegTech enterprise solutions with relationships with more than 200 enterprise clients, including more than 35 of the top 50 insurance companies.

Established in 2000 by former regulators, the company is recognized for continuous regulatory technology innovation with solutions hallmarked by workflow-directed processes, data integration, regulatory intelligence, automated validations, business process automation and compliance dashboards.

Trusted by the nation's top financial services firms, RegEd's proven, holistic approach to RegTech meets firms where they are on the compliance and risk management continuum, scaling as their needs evolve and amplifying the value proposition delivered to clients.