



SURANCEBAY

INSURANCE. SIMPLIFIED.

We are a full-service software-as-a-service (SaaS) firm providing solutions for all points of insurance distribution.

Our mission is to streamline and automate the process of buying and selling insurance.

Process new agent contracts easily, accurately, and – best of all – rapidly.

SureLA enables your home office L&C team to harness the power of the industry's leading licensing and contracting automation system, **SureLC**, in order to streamline agent on-boarding and merge business process workflows on a single platform.



Debuting in 2010, SureLC revolutionized insurance contracting, fast becoming the nation's #1 choice in licensing & contracting automation.

We can work with you to customize a SureLA package with an array of options to fit your needs. These include:

L & C Forms Updates

This is a complementary feature in which SuranceBay compiles your most up-to-date forms and makes them instantly accessible to subscribing agencies via our SureLC4BGAs service.

01

Data + Image Integration Service

We convert all data into digital form and in turn, forward you images in PDF or TIFF and any other format you desire. This service eliminates most data-entry requirements and is capable of integrating seamlessly into your existing workflow – working directly with your company and/or with a third-party service provider (e.g. vendor or TPA).

02

E-onboarding Service

While SureLC4BGAs is the market leader, we realize there are still some agencies which don't use it. To help you streamline the process for those who don't, we can provide them with a web-based portal enabling their producers to contract directly with your insurance company. This service also supports captive brokerages and directly recruited producers. With e-onboarding, the user-experience is specific to your company's desired workflow. After successful completion by the producer and agency, SuranceBay submits the information to your company (or third-party service provider) via data + image integration and/or email/fax/snail-mail submission.

03

Carrier Home Office Use Service

This service enables your home office employees to perform their business workflow requirements by consolidating processes into one system where they can obtain credit reports, criminal reports, state appointments, and & terminations. It can also be fully integrated with existing policy admin and/or commission systems.

04



is used by

575+ agencies

to optimize the workflows of

250,000+ producers

& includes the contracting forms of

460+ insurance carriers

with the monthly submission of

40,000+ agent contracts



Why you need it

Carriers receive hundreds – even thousands – of new agent contracts per month, requiring tedious manual data entry to transfer this information into their internal systems. This not only squanders time, but exposes the process human error. Further, this one-way flow of information your staff expends even more time fielding status inquiries and manually requesting missing or outdated information.

What's more: many carriers use a number of different systems to perform required workflows (state appointments, background checks, vector queries, etc.) which only compounds inefficiencies.

What it offers

For starters, carriers already pay nothing to keep their most up-to-date contracting forms included in the SureLC platform and accessible to all agencies subscribing to the service.

Two-way data integration

- With SureLA's data integration, your home office securely receives contracting data electronically – which eliminates the need for manual data-entry – in addition to PDFs of all contracting paperwork. This enables a new producers contract to be loaded into your system in 15 seconds, instead of the 15 minutes required to manually enter the same information.
- Subscribing agencies can view producer status directly within SureLC, reducing time spent fielding individual status requests.
- This data-integration is completely customizable, so whether you need a CSV file or XML file or any other format, we're able to support your needs.

External-facing web portal

For agencies that don't yet subscribe to SureLC, our solution also offers an agency/producer-facing portal that can be embedded within your company's website, enabling agencies and producers to electronically complete and submit all requirements for appointment requests.

Multi-faceted functionality

In place of multiple, disparate independent service providers, SureLA provides a one-stop-shop to perform necessary workflows involving:

Background Screenings

SureLC can save your company 20-50% off current background screening costs with instant access to existing background reports in our database. You can also order reports and view the results directly within application.

Appointments & Terminations

SureLC is fully integrated with NIPR and other data sources, allowing you to automate the appointments & termination process for producers.

Vector One reports

SureLC informs you whether a debit-check report exists for a prospective producer.

Product Training

Your producers can receive product-specific training within the SureLC platform to quickly and easily fulfill mandatory training requirements.

Carrier rule implementation

Our interface prevents Not-In-Good-Order paperwork by allowing you to incorporate your own rules to ensure that all producers meet your requirements prior to submission.

Contact

For more information or to schedule a demo, contact us at:

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 telepathy: (you tell us...)