

Insurance Agent Onboarding & Compliance

Seamless onboarding and compliance with Sircon & Salesforce.

Enable your sales managers to initiate agent onboarding requests directly from Salesforce Sales Cloud, eliminating the need for agents to rekey information, while providing status visibility throughout the onboarding process.

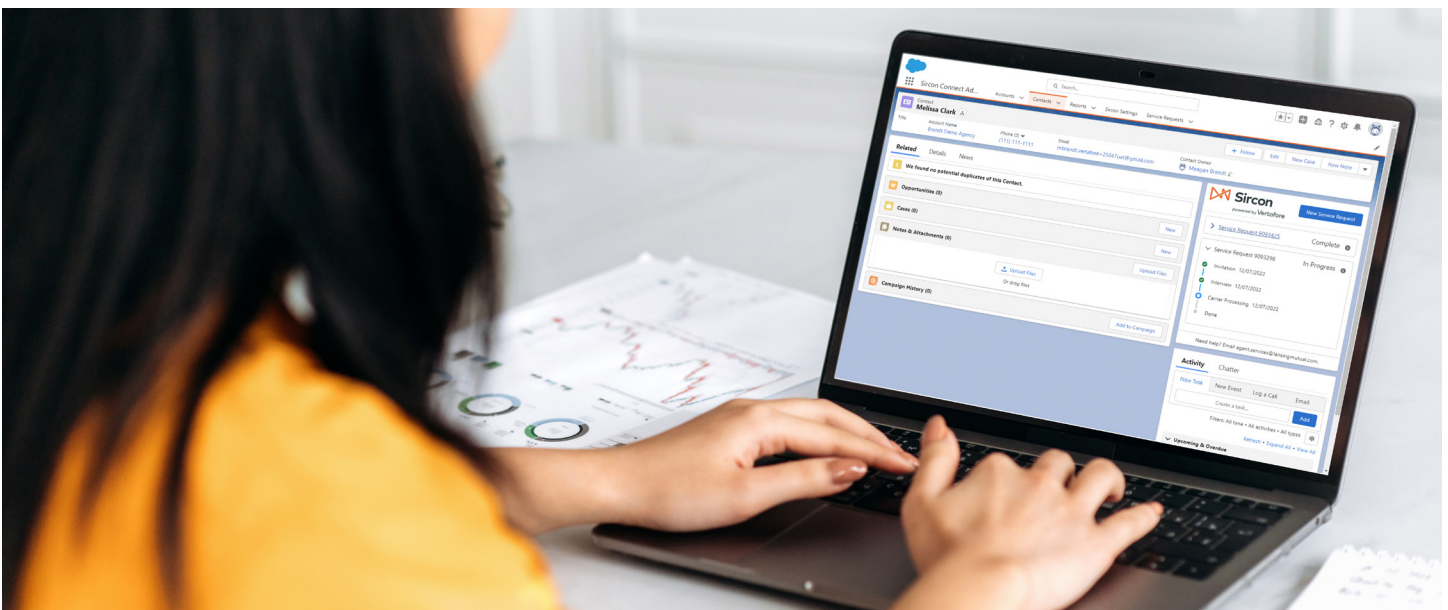
Sircon Connect appears as a panel on a contact or account record within Salesforce Sales Cloud that integrates with Sircon Onboarding and Self-Service to facilitate agent and agency onboarding.

Features you need:

- Prepopulate data from Salesforce for agent onboarding
- Onboarding status visible to manager and agents
- Agents complete onboarding within their Sircon accounts

Benefits you'll enjoy:

- Reduce errors by eliminating data rekeying
- Reduce service calls by displaying onboarding status within Salesforce
- Ensure compliance by embedding it directly into your existing processes and systems



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or call 877.876.4430