

## TECHNOLOGY SERVICES

# INSURANCE AGENT PORTAL

A SIKICH DIGITAL FRONT DOOR SOLUTION FOR INSURANCE

Streamline the way agents submit, track, and bind business - no matter your tech stack.

## EMPOWER AGENTS WITH A SEAMLESS SUBMISSION-TO-BIND EXPERIENCE

Sikich's Agent Portal, part of our Digital Front Door Solutions for Insurance, makes it easy for producers to do business with your organization. Whether your policy management processes are built on Salesforce, Insurity Pro Suite, or another policy admin system, this portal delivers a modern, intuitive experience that accelerates submission and quoting and improves transparency **without requiring a complete system overhaul**.

### KEY FEATURES



#### User Authentication

Secure agent access with login credentials and role-based permissions.



#### Policy System Data Connector

Out-of-the-box connectors for Salesforce Financial Services Cloud and Insurity Pro Suite. Custom integration is available for other systems.



#### New Submission Form

Capture coverage and insured details with document uploads all in one place.



#### Real-Time Submission Clearance

Eliminate duplicates with live insured name and address checks.



#### Quote Visibility

Give agents instant access to quote status and details across all submissions.



#### Accept & Bind Workflow

Enable agents to accept quotes and initiate binding fast and friction-free.



#### Agent Dashboard

Track every risk in progress with a real-time dashboard that shows:

- Status: In Review, Quoted, Declined
- Volume: Submissions, Open Quotes
- Outcomes: Bound or Declined

## BUILT FOR FLEXIBILITY

Deploy on Salesforce FSC, Sure MGA, or integrate with your existing policy system.

The Insurance Agent Portal is future-ready with enhancements already in the pipeline.

### YOUR DIGITAL FRONT DOOR STARTS HERE

Give agents the digital tools they expect, and your team the workflow control it needs.

Let's talk about how to tailor the Agent Portal for your business.



Hover camera over code to learn more

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