



## AGENT PROGRAMS

# We've got the tools for growing your book of business

No weeding required

It is said that increasing your business from within is easier than seeking new prospects from outside your client base. Accessing and culling through your own data to find opportunities, however, can be difficult and time consuming... lots of time.

### **Just in the NIC of time**

Now, NIC for Agents offers a single platform that provides access and insights into your book of business with In Force

data from multiple carriers and distributors. Instantly view profiles of policy owners, carriers, distributors and your current book of business, along with data insights and policy documents. Harvesting the data you need has never been easier or faster. Going from hours of work to seconds, NIC eliminates manual input, as well as searching and sorting; allowing you more time to grow your book of business.



Aggregating multi-carrier In Force data  
Leveraging data for cross-selling opportunities  
Creating new channels for digital engagement  
Improving communication with target marketing



# Data tools for a year-round growing season

Designed with first-hand knowledge of agents and business challenges, the Activate program from NIC offers effective and direct ways to harvest opportunities from within your own client base.

Requiring no manual labor, the Activate program offers data insights, communication channels, and business service support, along with powerful tools to identify sales opportunities:

## ● In Force Policies

- Single or multi-carrier view of book of business
- Policy and policy owner segmentation
- Data insights including sales and service opportunities

## ● Carrier and Distributor Profiles

- Access to the profiles, including services offered, marketing material, product information, support services and websites

## ● Policy Owner Profile and Policies

- Profile for each policy owner
- In Force data from multiple carriers
- Policy notifications and documents

## ● Communication Tools

- Direct (one-to-one) messages/chat with carriers, distributors and staff
- Broadcast messaging (one-to-many) messages from carriers and distributors
- Group chat (many-to-many) messages/chat with carriers, distributors and staff
- Notifications for agents and policy owners
- Document upload, storage, and sharing
- Message read receipts and reporting
- Supports document attachments
- Search, filter and create segments using multiple attributes



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### ● Sales and Service Opportunities

- Filter In Force policies to identify sales and service opportunities
- Export data into .csv with a single mouse click
- Multiple views of your book of business with filtering for multiple attributes

### ● Office Support

- Office view provides managing principals with access to multiple agents
- Administrative and other support staff have a single access to view and support multiple agents and their books of business

### ● 3<sup>rd</sup> Party Access Grants

- Agents can grant access to their book of business to 3<sup>rd</sup> parties including marketing staff and outside contractors such as accountants



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We are here in the NIC of time with  
In Force data across multiple carriers



Don't see one of your carrier partners? Contact us today and we will do all of the heavy lifting to get your In Force data included.



Go back to your organic roots to move your business forward.  
Contact us today to learn how NIC for Agents can help you  
harvest a new crop of prospects from your client base.

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## We are here in the NIC of time!

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**NIC**

Organic Growth Platform

NIC ~ Agent Programs