

# Producer Management

## Align Channel Performance for Superior Sales Results

Callidus Software Producer Management is designed for insurance carriers with large independent distribution channels, or a large numbers of captive agents. Callidus Producer Management streamlines producer administration by helping onboard, deploy, and pay producers, while providing visibility into channel operations and financial performance. Producer Management helps businesses not only realize significant hard dollar savings with better control and flexibility of incentive plans and payments to producers, but also rapidly onboard new producers, grow producer revenue and mindshare, and ensure long-term producer loyalty.

*Quickly onboard producers and get a 360-degree view of producer information*

### Using Callidus Producer Management, businesses can:

- Onboard new producers quickly and efficiently
- Contract producers to sell their products
- Ensure producers are licensed to sell specific products in the appropriate state(s)
- Manage complex payment hierarchies and schedules
- Track producers' payments and profitability

### Callidus Producer Management is designed to streamline producer administration and remove the challenges faced by administrators, including:

- Managing dynamic, complex relationships, hierarchies, and tiers of partners, agents, and resellers, as well as employees
- Tracking contracts and license and credential data for producers across multiple states and product lines
- Administering complex incentive plan including plans based on profit, market share, premiums, satisfaction and long-term book growth
- Managing and processing high volumes of transactions and data feeds from external sources and payees
- Gaining visibility into producer performance and payments

## The Value of Producer Management

Callidus Producer Management delivers a rapid return on investment through:

### ■ Business Alignment

Producer Management rewards channel partners and producers to drive key business initiatives. The solution ensures channel partners are paid accurately and on-time based on contracted performance.

### ■ Expanded Producer Community with Rapid Onboarding

Helps quickly and efficiently onboard new producers to help grow capacity, while ensuring risk is managed with comprehensive workflow capabilities.

### ■ Improved Producer Revenue and Mindshare

Removes cost and time barriers to effectively growing the producer community. The solution ensures producers can onboard and contract quickly with your business, and receive transparency into contract status, product terms and transactions and payments.

### ■ Better Decision Making

Accelerates decision-making through comprehensive analytics that provide insight into channel and producer performance, and cost of doing business.

### ■ Efficiency Improvements

Improves productivity through centralized management and provides visibility into producer demographics, licenses, appointments, continuing education, contracts and payment schedules.

## Key Features

- Provides integrated, 360-degree real-time producer view
- Support for automatic legal credential checking
- Support for producer payment relationships and rate schedules
- Automatic notification of expired licenses, appointments, continuing education and contracts
- Supports web services to allow real-time connection with other systems
- Integrated with Callidus TrueComp Manager and Reporting & Analytics to provide an end-to-end solution for managing channel sales performance



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