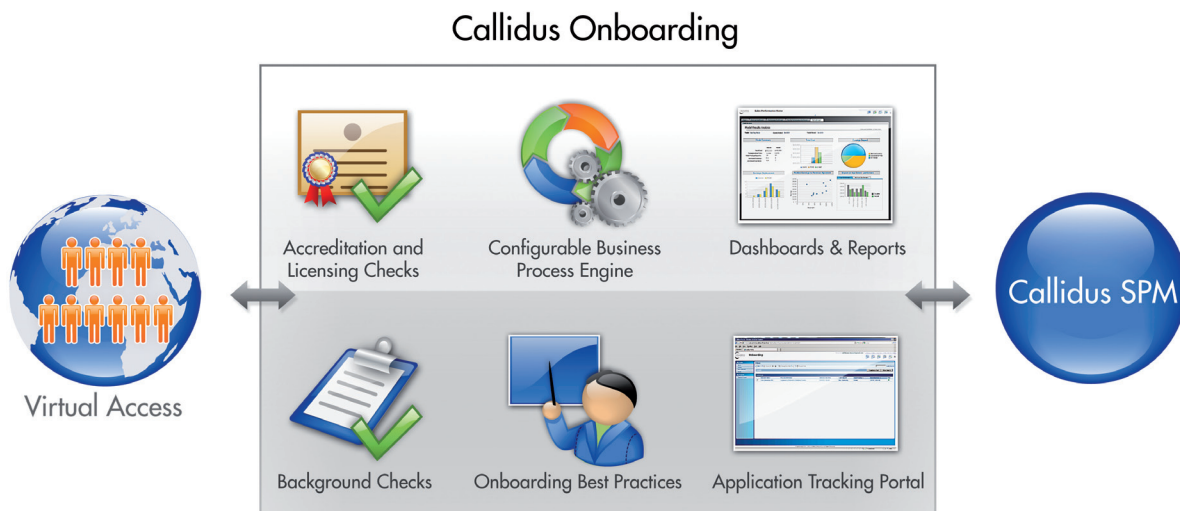




Callidus Onboarding

Accelerate agent and producer onboarding without the risk to drive more rapid channel performance

Callidus Onboarding provides a flexible platform for users to design, deploy, and optimize workflows for critical sales channel onboarding processes. The solution helps accelerate agent and producer recruiting, onboarding, and contracting, enabling companies to reduce the time to meet critical channel capacity requirements and revenue goals, and control the costs of doing business with large producer volumes. With built-in background checking and accreditation processing and tracking, the solution manages the risk of new appointments as well. This enables organizations to focus their efforts on managing their sales channel performance instead of managing paper trails, audit requirements, and risk compliance inherent to agent and producer management.



Easily align capacity with revenue targets by automating the agent and producer onboarding process

Using Callidus Onboarding, businesses can:

- Automate core onboarding processes such as partner recruiting, application tracking, background checking, accreditation processing, contracting, and deployment
- Reduce operational costs of adding producer capacity by automating the most common business processes and integrations
- Verify producer and agent data for background checking and accreditation requirements in real-time to comply with regulatory guidelines
- Ensure compliance with federal, local, and corporate requirements with comprehensive auditing capabilities
- Gain visibility into the day-to-day execution against recruiting and onboarding status with integrated tracking dashboards

Callidus Onboarding addresses the most common challenges faced by organizations today, including:

- Negotiating with multiple systems infrastructures that are rigid and prevent you from meeting channel capacity targets on time
- Tracking the progress of agent and producer onboarding and contracting against capacity targets
- Staffing and managing application paperwork and communications processes cost effectively
- Managing the risk of appointing and contracting independent agents and producers
- Integrating the agent onboarding process with partner license and credential management for compliance
- Managing the paper trail of key contracting procedures and requirements for compliance

The Value of Callidus Onboarding

Callidus Onboarding delivers a rapid return on investment through:

- **Greater channel capacity management**
Ensures businesses can cost effectively recruit, onboard, and track progress toward the agent and producer capacity required to meet revenue targets on time
- **Rapid agent and product deployment**
Accelerates time to onboard and field new agents and producers by automating a wide range of operational processes and storing all paperwork and updates centrally
- **Reduced risk of new appointments**
Enables organizations to ensure regulatory compliance in an efficient and cost-effective manner with automated background checks accreditation processing and tracking
- **Cost effective agent and producer management**
Reduces the cost of onboarding and communicating with new agents and producers with an easy to use web-based self-service agent platform, which distributes the process of onboarding and all related communications to the agent community and away from a central back office

Key Features

- Flexible workflow platform that can easily be customized to meet a wide range of onboarding process configuration requirements
- Pre-configured solutions for onboarding provides out-of-the-box industry best practices and more rapid implementation
- Secure, self-service portal for agent and producer recruiting, communications, reporting, and data capture
- Comprehensive electronic signature tracking
- Single repository for storing all agent demographics and contracts throughout onboarding and appointing, and compensation processes
- Real-time verification of producer and agent data for background checking and accreditation requirements, including seamless integration with third-party registries and services such as the National Insurance Producer Registry (NIPR)
- Full integration with the Callidus SPM suite for channel management, compensation management, and channel communications and reports

For more information about Callidus Onboarding Suite, please visit <http://www.callidussoftware.com/products/onboarding>.



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