Simplify producer life cycle management

Producers are the sales engines of your company, yet managing this important business relationship is still an inefficient process. Producer information is typically spread across multiple systems, making it difficult to maintain trusted data across the organization. Legacy systems limit flexibility and don’t integrate well, resulting in disparate data sources that increase operating costs. Worse, they risk introducing inaccurate data that negatively affects the business.

Producer Pro consolidates all producer data into a highly configurable cloud-based solution that deploys quickly, connects easily with other systems, automates and streamlines producer administration, and eliminates the need for multiple silos of information. Producer Pro by CallidusCloud offers a 360-degree, real-time view of all critical producer data via a comprehensive, flexible, and extensible platform available 24 x 7 to desktop and mobile users. The culmination of 15 years’ experience in the insurance industry, Producer Pro leverages our strong relationships with insurers and the proven and trusted infrastructure of CallidusCloud.
Key benefits:

- **Deploy quickly** a fully configurable cloud-based solution, purpose-built for the insurance industry
- **Improve efficiency** by automating manual processes, reducing paper, and consolidating multiple producer records onto a single platform
- **Support producers and users on the go** with a solution available 24x7, securely accessible from a desktop, tablet, or smartphone
- **Minimize load on IT** by leveraging advanced configuration tools designed for business users in a secure, high-performance environment
- **Gain visibility** with data updated in real-time, complete audit trails, out-of-the-box reports, and the ability to trace every action
- **Simplify integration** with existing systems through a full complement of REST-based web services and batch integration utilities
- **Extend the solution as needed** without coding, or through seamless integrations with other CallidusCloud solutions, including Onboarding, Incentive Compensation Management (ICM), Learning, and more

**Easily manage complex producer relationships**

Managing producer compliance profiles, demographics, hierarchical relationships, and changing roles over the duration of the business relationship is a difficult undertaking. With Producer Pro, a single producer master record offers a consolidated view of the multiple roles and relationships an individual may have with your organization. Each record contains hierarchical relationships and complete compliance profiles, including E&O license checks, appointments, background checks, contracts, and more. Through a graphical user interface, business users can extend the data set to suit your unique business needs, including defining new screens and fields. Producer Pro also manages and tracks books of business and supports a wide range of mass change functions, automating repetitive tasks and improving business efficiency.

**Integrate securely with internal and external systems**

Different business units often need access to producer data, resulting in multiple data silos that risk introducing data synchronization errors. Producer Pro consolidates all your producer data into one extensible platform that connects to your legacy systems or other SaaS services. REST-based web services and enterprise-grade ETL tools simplify both real-time and batch integration, ensuring all data is accessible across the enterprise and eliminating the need for redundant databases of producer information. You can seamlessly extend Producer Pro with other CallidusCloud insurance solutions, including Onboarding, Incentive Compensation Management (ICM), Learning, gamification, and more.

---

**Note:** Single source of truth
Maintain compliance with the ever-changing regulatory environment

Producer Pro includes turnkey integrations with the National Insurance Producer Registry (NIPR), the Depository Trust & Clearing Corporation (DTCC), the Financial Industry Regulatory Authority (FINRA), and others, ensuring producers have valid credentials and your data is synchronized in real time with regulators. With an integrated toolset to support compliance tracking, and monitoring of licenses and appointments and education or certification records, Producer Pro cuts the time and effort needed to keep producers compliant. Tracking your business compliance is easy with detailed audit logs that capture changes made to every screen. Regular software updates keep your business up-to-date with any regulatory changes.

Streamline producer communications

While it’s good to understand producer relationships in depth, it’s better to develop them into valuable affiliations that improve efficiency and enhance your brand with agents. With Producer Pro, you can proactively communicate important information that could impact a producer’s productions and earnings. Using workflow logic, you can set alerts that automatically notify agents of continuing education or licensing requirements, and provide links to appropriate training or certification agencies. Branded correspondence templates let you generate personalized batch or on-demand communications quickly, delivered by email or printed for mailing, so your producers can stay productive and keep selling.
About CallidusCloud

Callidus Software Inc. (NASDAQ: CALD), doing business as CallidusCloud®, is the global leader in cloud-based sales, marketing, learning, and customer experience solutions. CallidusCloud enables organizations to accelerate and maximize their lead to money process with a complete suite of solutions that identify the right leads, ensure proper territory and quota distribution, enable sales forces, automate configure price quote, and streamline sales compensation — driving bigger deals, faster. Over 4,600+ leading organizations, across all industries, rely on CallidusCloud to optimize the lead to money process to close more deals for more money in record time.

Start generating value sooner

Many producer solutions require complex coding to meet your unique requirements or integrate with other solutions. While developers are writing and testing code, the solution is not generating value for your organization. Producer Pro is purpose-built for business users. Without coding, business users can easily add, move, or change fields, design and generate reports, customize screens, change hierarchies, and more. This configurability does not impact performance, software upgrades, or new feature introductions, so you will always enjoy the newest innovations with predictable performance.

Out-of-the-box reports for planning and compliance give you immediate visibility into producers, with no extra configuration required. With over 15 years of experience in the insurance industry, CallidusCloud implementation and training services help insurers realize a turnkey Producer Pro solution that is up and running in a fraction of the time of other solutions.

Partner with a trusted cloud provider

CallidusCloud is the global leader in cloud-based sales, marketing, and learning solutions. Over 3,700 organizations, across all industries, trust CallidusCloud to optimize the lead to money process to close more deals for more money in record time. Supporting over 2.5 million users and billions of transactions a month with 24x7 system support and guaranteed SLAs, CallidusCloud offers the high availability and performance insurers need to do business. And with defense-in-depth security from user identity and authentication to encrypted data streams and storage, you can be sure your data is secure and accessible by only validated users.

Brochure: Producer Pro by CallidusCloud

CallidusCloud is the global leader in cloud-based sales, marketing, and learning solutions. Over 3,700 organizations, across all industries, trust CallidusCloud to optimize the lead to money process to close more deals for more money in record time. Supporting over 2.5 million users and billions of transactions a month with 24x7 system support and guaranteed SLAs, CallidusCloud offers the high availability and performance insurers need to do business. And with defense-in-depth security from user identity and authentication to encrypted data streams and storage, you can be sure your data is secure and accessible by only validated users.