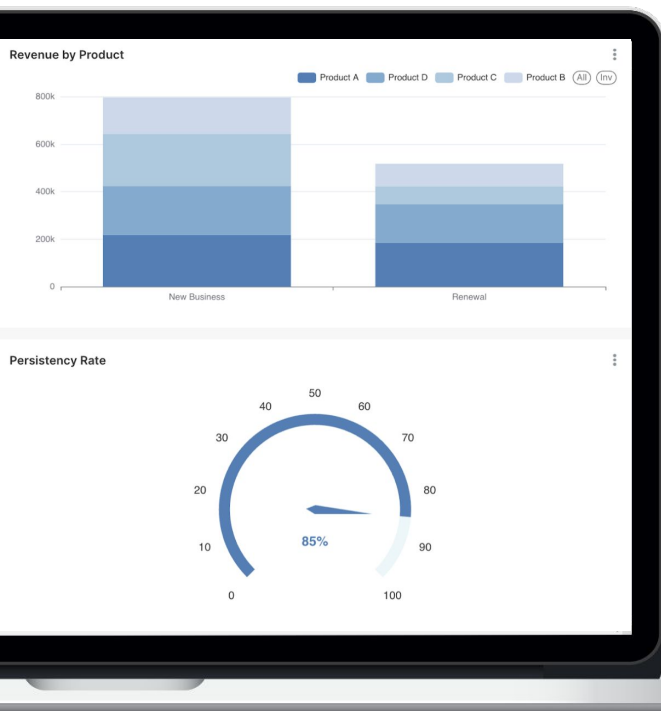# Vymo EngageIQ for Leaders

Empower Insurance **Sales Leaders** and Management

Vymo EngageIQ features AI-enabled performance insights, unlocking predictable revenue production and enhancing producer experience. This application seamlessly consolidates essential tools and empowers sales leaders to propel producers and agencies to new heights by delivering data-driven insights directly to their fingertips.

Effortlessly track progress towards goals, direct team actions, and leverage AI to fast-track your organization's sales activities.
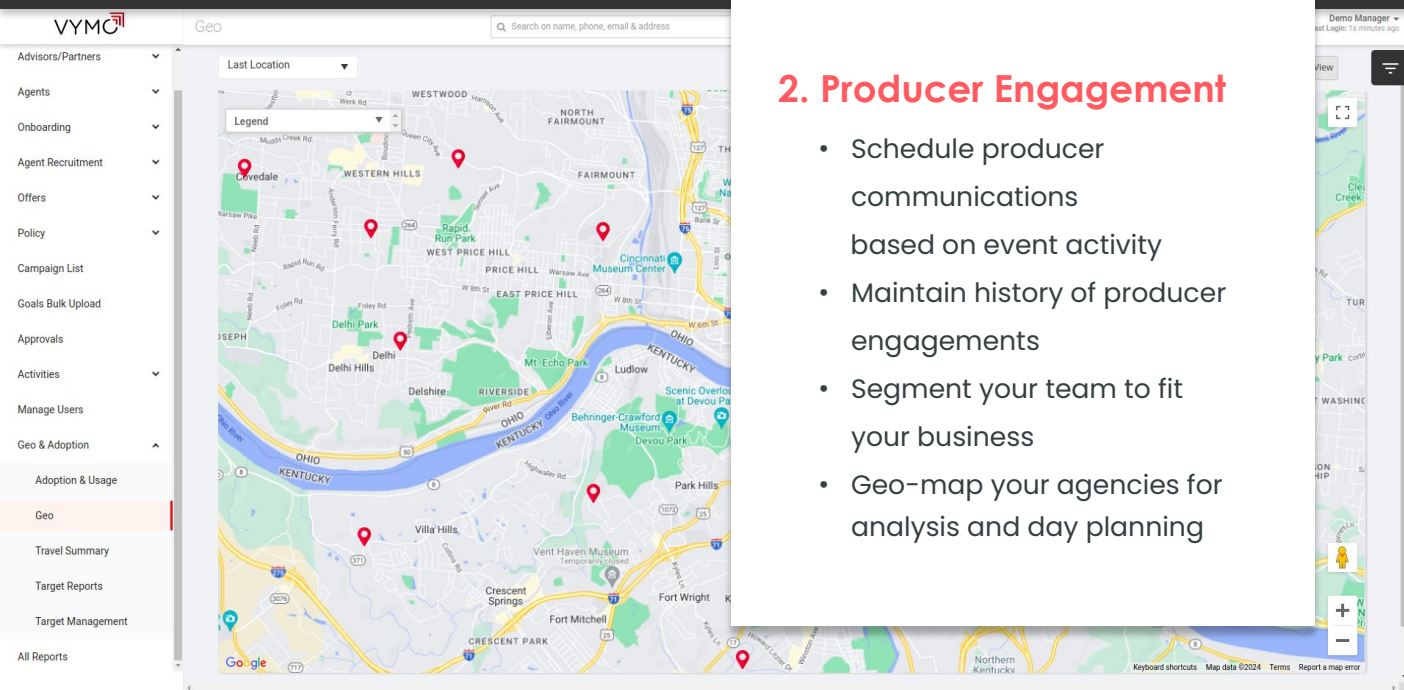
Drive Accelerated, Predictable Growth Designed for Insurance Leaders

✔ Optimize your organization's lead conversion rate and ensure greater predictability in revenue production by directing leads to the producer most likely to close the deal.

✔ Enhance the producer experience and elevate your organization's persistency rate with proactive workflows that notify producers of high impact events and prompt timely customer-contact initiation.

✔ Empower your sales teams with seamless automation and a unified platform for training and workflows, eliminating overhead costs and enhancing the producer experience.

✔ Deploy leaderboards and gamification to recognize excellence in sales performance and behaviors that drive success.

✔ Improve producer retention by equipping them with a best-in-class relationship management platform, enhancing the overall producer experience and fostering long-term success.
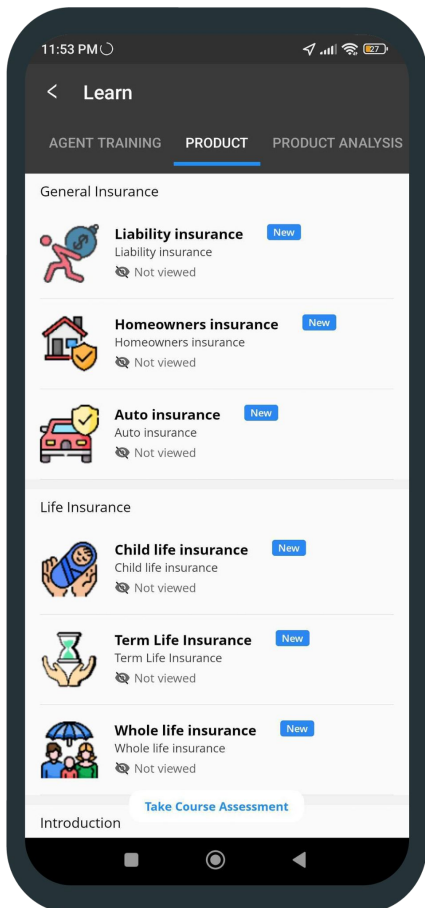

1. Leadership Support

- Track your corporate KPIs in a single dashboard
  - Product mix
  - Production
  - Recruiting

- Set and manage team production goals
  - AI-enabled performance insights
  - Leaderboards
  - Gamification
  - Incentives
  - Bonus programs

2. Producer Engagement

- Schedule producer communications based on event activity
- Maintain history of producer engagements
- Segment your team to fit your business
- Geo-map your agencies for analysis and day planning

3. Just-In-Time Training

- Schedule product and sales training to drive your sales efforts
- AI-enabled performance training for your team
- AI training program built just for you

4. Key KPIs

- User adoption
- Persistency
- Lead visibility
  - Conversion
  - Generated
- New production to goal
- Revenue to goal
- Activity to production
- Up-sell/cross-sell rate

Gain Control of the Metrics that Matter Most to You

Production KPIs

- ✔ Monthly/quarterly/annually
- ✔ Insurance
- ✔ Investment
- ✔ Retail
- ✔ Wholesale

- New sales to goal
- Revenue to goal
- User adoption
- Policy lapse
- Policy renewal
- Lead conversion
- Leads generated

- No. of binds
- Up-sell/cross-sell
- Deposits
- New customers

Activity Visibility

- ✔ Monthly/quarterly/annually
- ✔ Insurance
- ✔ Investment
- ✔ Retail
- ✔ Wholesale

- No. of new quotes
- No. of binds
- Activity to goal (quota)
- Activity to first contact
- Activity to quote

- Activity to issue
- No. of partner contacts
- Activated producers

* metrics available at each level of hierarchy by product

FEATURE LIST

Vymo EngageIQ

Producer Engagement

- Event based engagement
- Email, calendar, virtual meeting sync with popular platforms
- Geo-intelligence
- Segment based engagement

AI-Enabled Performance Management

- Production goal setting
- Performance insights
- Sales reviews
- Leaderboards
- Gamification
- Incentive tracking
- Bonus tracking

Producer Segmentation

- Tenure
- Production
- Product type
- Geo
- Producer attributes

Training

- LMS for producers
- Product
- Sales
- AI-enabled performance training
- AI-enabled course creation

Why **Vymo** EngageIQ

Our solution equips leaders with timely, impactful information; utilizing a unified platform to turbocharge sales teams and drive predictable revenue growth. This significantly improves the overall producer experience.

- A single log in to all key information leadership requires
- Sales, Book of Business, corporate KPIs
- Integration solutions for popular selling tools such as Salesforce, D365, Zoom, GMail, Outlook, and internally developed systems
- Flexible workflows to meet your business needs
- Activity tracking to find out what sells
- AI enabled throughout

Selling Technology Driven by a Modern Technical Stack

At the heart of the Vymo Smart Distribution Management Platform, Machine Learning (ML) and Artificial Intelligence (AI) enhances both distribution transformation and the producer experience. Vymo OnboardIQ and EngageIQ are seamlessly integrated with industry-leading platforms: NIPR, Salesforce, Microsoft Dynamics, Zoom, etc; and easily integrated with leading third party or home-grown administration systems. Through real-time integrations, Vymo provides essential insights and tools empowering your team to thrive and succeed.

Vymo's technology is built with many foundational elements that our customers look for:
- **Verticalized**: Solutions and expertise are focused on Financial Services
- **Modern**: Microservices, event driven, extensible
- **Secure**: SOC2 Type II Compliant, ISO/IEC 27001:2013 Certified, GDPR Compliant
- **Scalable**: Horizontally scalable, cloud native, highly available, redundancy built-in
- **Multi Device**: Native mobile and tablet apps (iOS, iPadOS, Android), fully responsive web app
- **Enterprise Ready**: Support for deep integrations, complex hierarchies, mission critical business needs
- **SaaS**: Multi-tenant, global hosting by Microsoft Azure

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Vymo