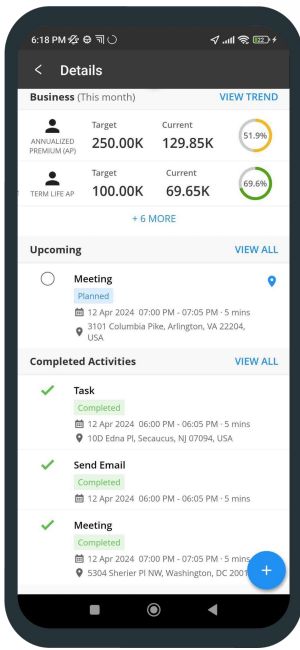




Vymo EngageIQ for Sellers

Elevate your **Producers** with a Mobile-First, AI-Enhanced Experience

Experience a game-changing shift in the selling process with Vymo EngageIQ, seamlessly combining multiple enterprise systems into a unified, mobile-first experience that drives sales results. This transformation not only modernizes the producer experience, but also provides sales leaders with unparalleled visibility into the pipeline and sales activities, leading to significant revenue growth and an unmatched level of producer satisfaction.

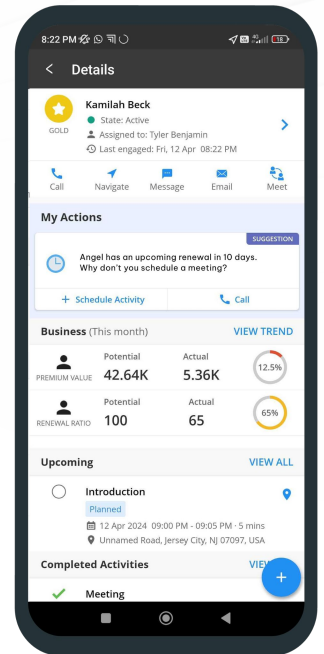


Increase Lead Conversion Rate

Guide producers to understand which leads to work and the most productive actions to take, while automatically tracking the activity against each lead.

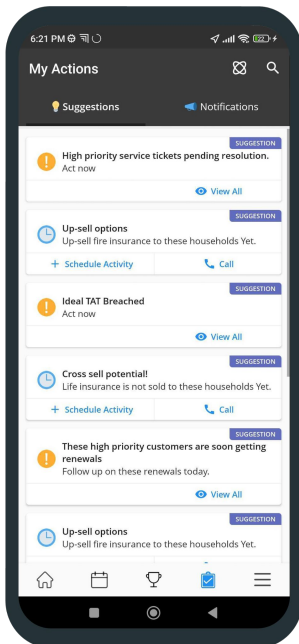
Maximize Persistency Rate

Proactively notify producers of upcoming renewals with AI generated notifications of "Next Best Action" to maximize persistency.



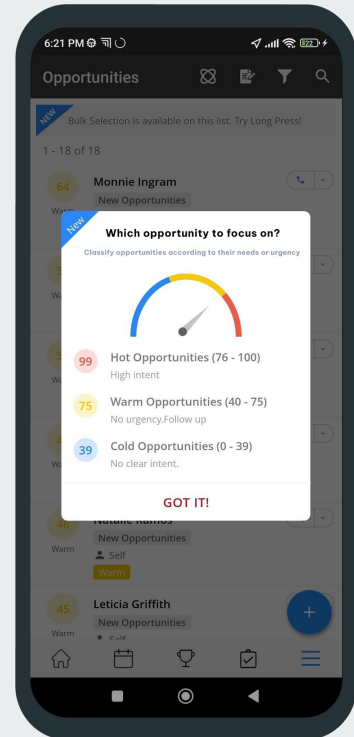
AI Generated Notifications

Advise producers in real-time on lucrative up-sell and cross-sell opportunities and promptly notify them of outstanding offers. Increase average deal size and volume, maximizing potential for revenue growth.



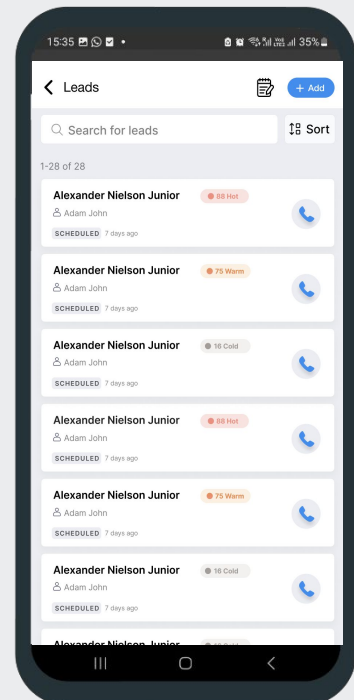
1. Producer Selling

- Social selling
- Event management
- AI-driven lead queues
- AI-driven workflows to optimize the sales path
- Rule-based lead nurturing
- Geo-mapped lead tracking
- Point of sale simplicity
- Activity tracking from first contact to sale
- AI-driven activity to production recommendations



2. Producer Book of Business Management

- Service customers
- Offer recommendations
- Proactive persistency notifications
- Visibility into claims processing

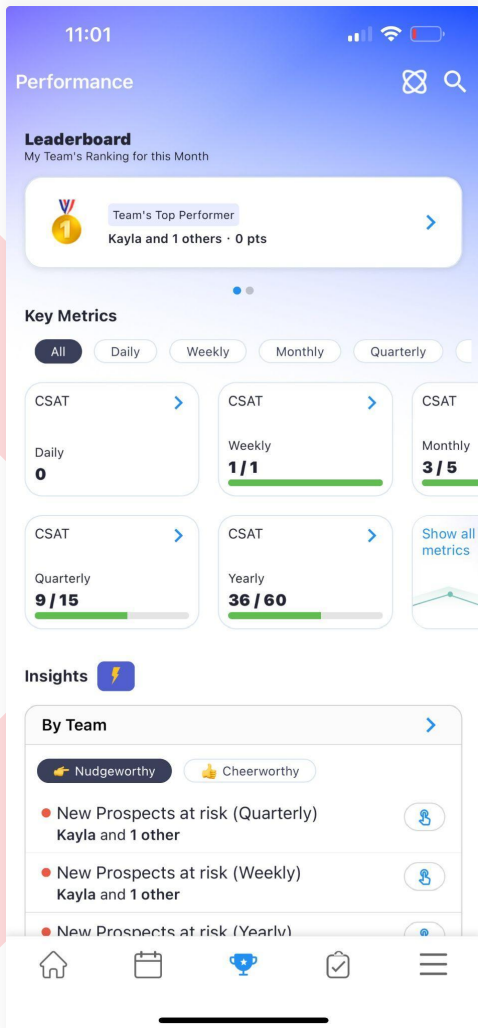


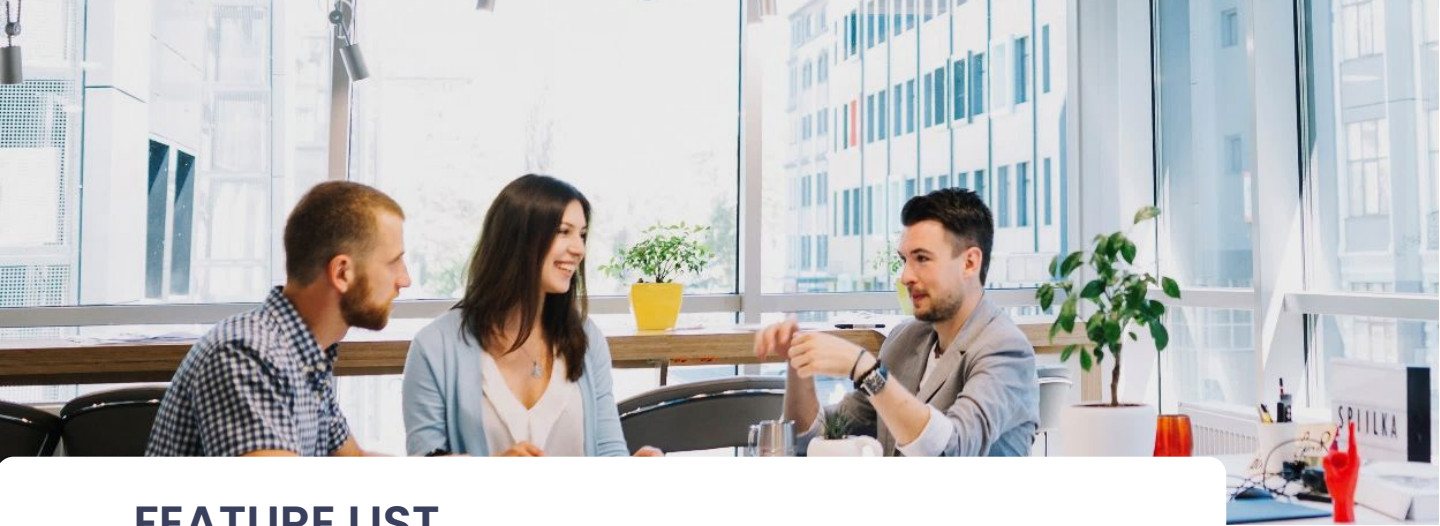
3. Producer Performance

- AI-driven goal management
- Leaderboards
- Gamification
- Incentive tracking
- Proactive performance training
- Commission statement visibility

4. Key KPIs

- Producer Book of Business persistency
- Producer activity to outcome tracking
- Producer trend to goal
- Producer cross-sell/up-sell performance





FEATURE LIST

Vymo EngageIQ

• **Producer Prospecting**

- Social selling
- Event management
- Referral management

• **Producer Sales Engagement**

- Schedule outreach
 - Email
 - Text
- Automatic activity capture
 - Calendar
 - Email
 - Virtual meetings
 - Calls
 - Texts
 - Face to face meetings
- Geo-intelligence
 - Route mapping
 - Nearby leads and customers
 - Suggested meetings
 - Automatic meeting detection

• **Enterprise Lead Management**

- Adding new leads
 - Bulk uploads
 - API push
 - Manual additions
- Lead allocation
 - Rule based
 - Machine learning
- Lead scoring and prioritization
 - Rule based
 - Machine learning
- Configurable workflows

• **Point of Sale Simplicity**

- Product recommendations
- Offer management
 - Bulk uploads
 - API push
- Quoting
 - Integrate with quoting app
 - Vymo quick quote
- eApp
 - Integrate with eApp provider

- **Producer Book of Business Management**

- Customer 360 view
- Policy lookup
- Renewal/lapse management
- Cross-sell/up-sell
- Claims visibility
- Service ticket history

- **Producer Performance**

- Goal and KPI visibility
- Leaderboards
- Gamification
- AI-enabled training
 - Product
 - Performance
 - Co-pilot
- Incentive tracking
- Commission statement visibility

“ 80% of workers are Mobile-First, and Vymo has achieved an industry-leading 85% daily usage across 65+ Enterprise Deployments. ”

Gordon Ritter

Co-founder, Emergency Capital | Investor
in Salesforce, Vymo Veeva



Why Vymo EngageIQ

Elevate your producers' experience with the most advanced, mobile-first, AI-enhanced experience available today. Unlock unprecedented acceptance from users and deliver a one-of-a-kind producer experience with the Vymo platform. Simplify the intricacies of modern selling by seamlessly integrating with your existing systems. Offer producers a cohesive view that empowers them to excel and drive sales with reduced effort allowing enhanced performance visibility, new business engagement, and book of business management.

- A single log in to all key information a seller requires
- Integration solutions for popular selling tools such as Salesforce, D365, Zoom, GMail, Outlook, and internally developed systems
- Flexible workflows for lead distribution
- Activity tracking without the hassle of entering notes at the end of the day
- 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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