

# Vymo OnboardIQ

## From Prospecting to Ready to Sell: A Complete End-To-End Solution

Vymo OnboardIQ accelerates producer readiness and efficiency by simplifying the entire recruitment, onboarding, and compliance process; transitioning new recruits into sales roles. Vymo enables your sales team to take on an active role in recruitment, rather than relying on your HR department and their tools. This streamlined approach not only expedites the process, but also enhances the overall producer experience, ensuring they are equipped and empowered to succeed from day one.

# Vymo Modernizes Producer Administration for Life & Annuity, P&C, and Health Insurers

## Producer Recruitment

- Target & prospect new recruits through social media
- Track prospecting events
- Nurture your candidate pool with event-based messaging
- Activity tracking throughout the recruitment and enablement processes
- Integrate with your HRMS for pipeline and applicant tracking visibility

## Leadership Visibility

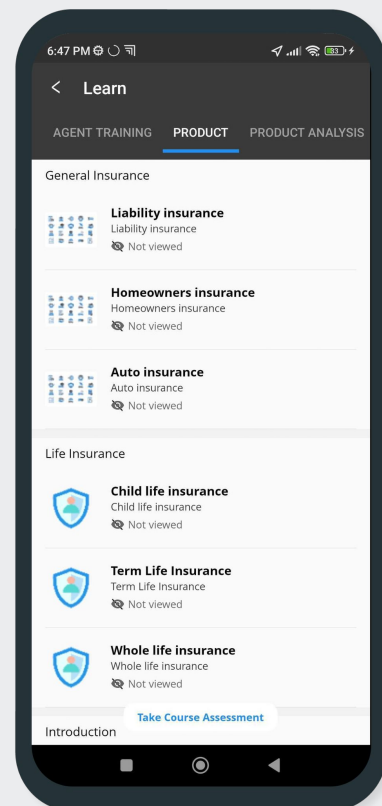
- Custom dashboards
- Workflow visualization
- Reporting & Analytics

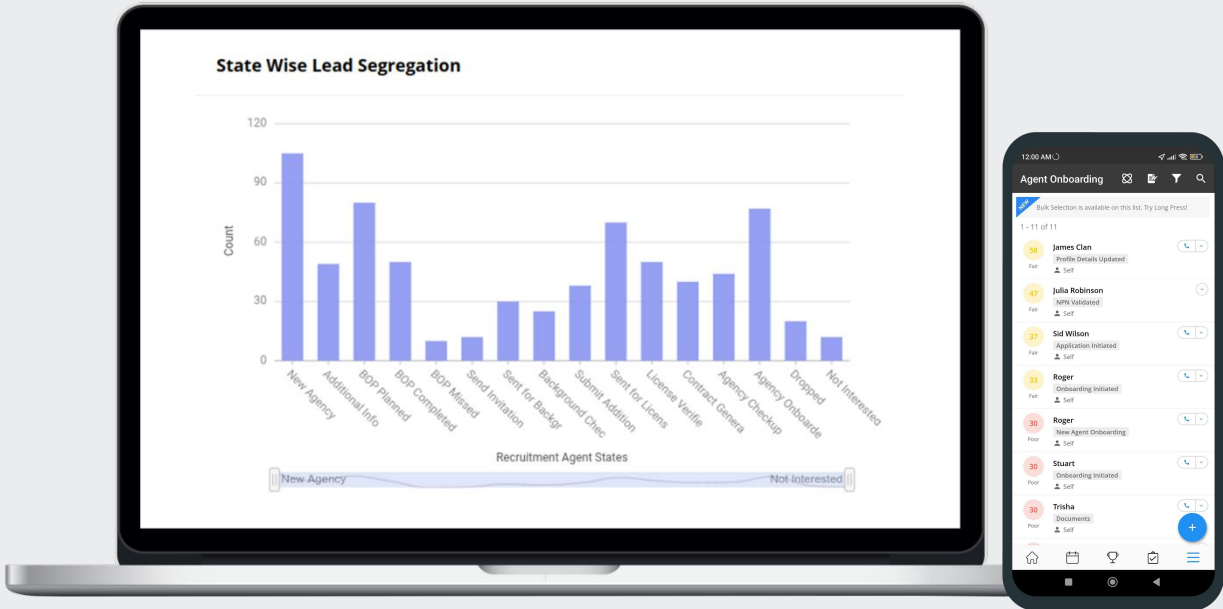
## Key KPIs

- Recruiting goals
- Producer time to sell
- Training success

## Producer Onboarding

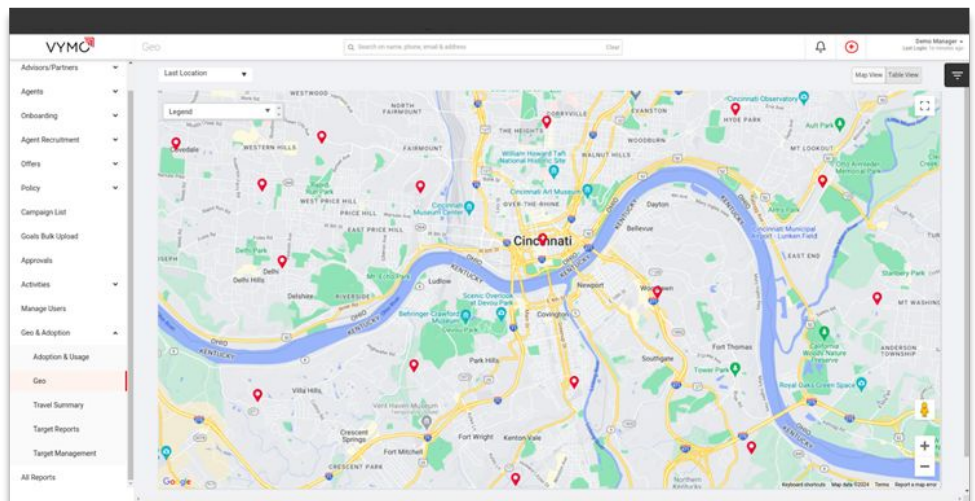
- Onboard producers and agencies
- Full digital experience
- Customizable workflow solutions with approvals
- License and appointment management (including JIT)
  - NIPR PDB integration
  - NIPR alerts
  - Renewal notifications
  - Termination management
  - Eligibility checks
- Fee management
- Background check integrations
- AI training recommendations
- Contract generation
- eSignature





## 1. Producer Recruitment

Boost revenue and producer satisfaction by recruiting the right producers with Producer Recruitment. Utilize Vymo’s social media sharing, event tracking, and referral tracking to increase and optimize your applicant pool. Track producer stages from “Newly Onboarded,” to “Ready to Sell,” to “Productive.” Make better hiring decisions likely to increase revenue production and reduce producer churn.



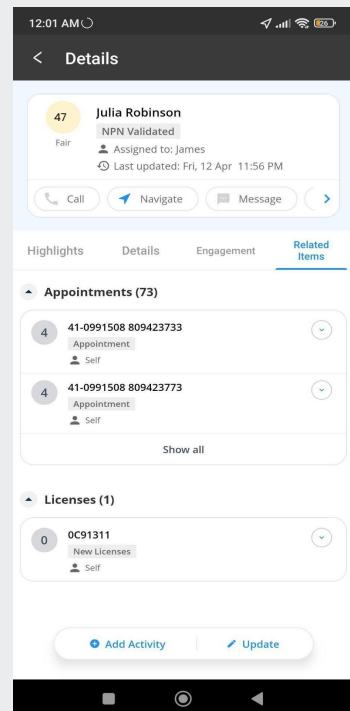
## 2. Producer Onboarding

Utilize digital onboarding of producers with workflow-based approvals. Modernize your onboarding process with integration to the NIPR PDB, automated background checks, and intelligent creation of contracts with eSignature. Manage compliance with NIPR alerts, renewal notifications, termination management, and eligibility checks.



## 3. Just-In-Time Appointments

Accelerate revenue production by enabling your producers to sell swiftly using multiple methods of appointing including Just-In-Time (JIT) appointments, ensuring rapid access to markets for increased revenue generation. Just-In-Time appointments allow insurance sellers to delay appointing a producer and paying the associated fees until the producer begins writing business for that seller.





## FEATURE LIST

# Vymo OnboardIQ

### Producer Recruitment

- **Prospecting and intake**
  - Social media recruitment
  - Web application and mobile
  - Prospect “meet & greet” tracking
  - Referral tracking
  - Integration with HRMS systems
- **Prospect/candidate nurturing**
  - Marketing content delivery
    - Social
    - Email
    - SMS
- **Candidate management**
  - AI-driven prioritized candidate lists
  - Candidate segmentation to fit your hiring needs
  - Manage by segment
- **Application visibility**
  - Send candidate(s) link to apply through your HRMS
  - See candidate(s) internal workflow status
  - Get prompts as candidates progress through the workflow



## Compliant Producer Onboarding

- **Full digital experience**
  - Web application and mobile
  - eSignature
  - Document uploads
- **Contracting**
  - Contract generator
  - Link to compensation plans
  - Vesting rules
  - Appointing rules
- **Licensing**
  - Synchronization with NIPR and PDB
  - Resident license
  - Non-resident license
  - Renewal tracking
  - NIPR fee tracking
- **Appointing**
  - Just-In-Time appointments
  - Background checks
  - Appointment renewals
  - Configurable workflows
  - Termination process
    - Including termination for lack of production workflow
  - Appointment fee tracking
- **Eligibility checks**
  - Check licenses and appointment status
  - Web service for client use
  - Reporting
- **Hierarchy management**
  - Role management
  - Product authority
  - Territory management
- **Training**
  - Producer LMS
    - Product training
    - Compliance training
    - Sales training

## Leadership Visibility

- Configurable workflows to meet your business needs
- Dashboards
- Reporting

## Why **Vymo** OnboardIQ

Increase your prospect pool, onboard and enable producers efficiently and effectively, and maximize revenue production by reducing the time your producers will be “Ready To Sell.” Enhance the producer experience and streamline your workflow with straight-through processing by consolidating your recruiting and onboarding ecosystem. This ensures a seamless process focused on quickly getting your team selling and achieving corporate goals.

- Digital first
- One platform for straight-through processing from recruitment to “Ready To Sell” status
- JIT license and appointment processing to reduce expenses
- Workflow visualization to track the producer pipeline
- Organizational KPI visualizations to stay on track with recruiting goals

## 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 Vymo 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, and 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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